Maine State Immunization Information System

User Manual

Version 2.8.0

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CHAPTER 1: INTRODUCTION

In this chapter:

The following sections are an overview of Immunization Information Systems (IIS), reproduced with the permission of All Kids Count, a nonprofit organization dedicated to the improvement of immunization rates in children.

WHAT ARE IMMUNIZATION INFORMATION SYSTEMS

Immunization information systems are confidential, computerized state- or community-based information systems. In the *Healthy People 2010* program, the U.S. Department of Health and Human Services set a goal of enrolling 95% of children from birth through age five in a fully functioning immunization information system, noting, "Population-based immunization information systems will be a cornerstone of the nation's immunization system by 2010".

Immunization information systems enable public and private health care providers to consolidate and maintain computerized immunization records on all children within a given geographic area. They enable multiple authorized health care professionals to access the consolidated information on the immunizations that any child has received. They help doctors remind parents when their children are due or overdue for immunizations. They help health care professionals stay abreast of the complex immunization schedule.

WHY WE NEED IMMUNIZATION INFORMATION SYSTEMS

The U.S. now enjoys the highest immunization rates and lowest disease levels ever but sustaining them is not easy. One of the greatest challenges is the growing complexity and volume of immunization information:

- Over 11,000 children are born each day, each needing 18-22 shots by age six to protect them from debilitating, life-threatening diseases.
- An increasingly complex childhood immunization schedule makes it difficult for health professionals to keep up, even with the help of books, charts, and training.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change health care providers with increasing frequency. This may lead to immunization records that are fragmented between multiple clinics making it difficult to assess whether a patient is truly up-to-date.
- Some parents may not choose to immunize their children, because of increasing concerns about vaccine safety. With better access to data, providers can address the vaccine safety concerns in their community.
- Immunization information systems help to avoid disease outbreaks by providing accurate, up-to-date information about the immunizations that people receive.

THE MAINE IMMUNIZATION INFORMATION SYSTEM

The Maine Immunization Information System (ImmPact) is intended to be a repository for accurate and up to date immunization records for all persons born, residing, or receiving vaccine in the State of Maine. ImmPact is able to perform a variety of functions for health care providers, including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts for shots due and past due
- Producing recall and reminder notices, vaccine usage and patient reports
- Managing vaccine inventory
- Ordering vaccine

ImmPact Vision, Mission and Goals

Vision: Every person living in Maine accesses high quality care services and is free of vaccine-preventable disease.

Mission: The Maine Immunization Program strives to ensure full protection of all Maine children and adults from vaccine-preventable disease. Through cooperative partnerships with public and private health practitioners and community members, the MIP provides vaccine, comprehensive education and technical assistance, vaccine-preventable disease tracking and outbreak control, accessible population-based management tools, and compassionate support services that link individuals into comprehensive health care systems.

Goal: The primary purpose of the system is to collect data related to vaccine administration, and to promote effective and cost-efficient prevention of vaccine preventable diseases. This rule is issued pursuant to the statutory authority of the Department of Human Services under 22 M.R.S.A §1064.

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CHAPTER 2: SYSTEM REQUIREMENTS

In this chapter:

Internet Access
Hardware Requirements
Software Requirements

INTERNET ACCESS

ImmPact is a web-based application. You will need reliable Internet access, preferably with a dedicated high-speed connection. A dial-up connection will also work but is not recommended.

HARDWARE REQUIREMENTS

The following are minimum hardware requirements for accessing ImmPact:

- Pentium 500 MHz computer
- 64 MB RAM
- 500 MB free disk space
- Screen display set at a minimum of 800 x 600 resolution and 256 colors
- Mouse and keyboard

SOFTWARE REQUIREMENTS

The following are minimum software requirements for accessing ImmPact:

- Microsoft® Internet Explorer, version 9.0, Chrome, Firefox
- Adobe Acrobat Reader® 6.0 or higher

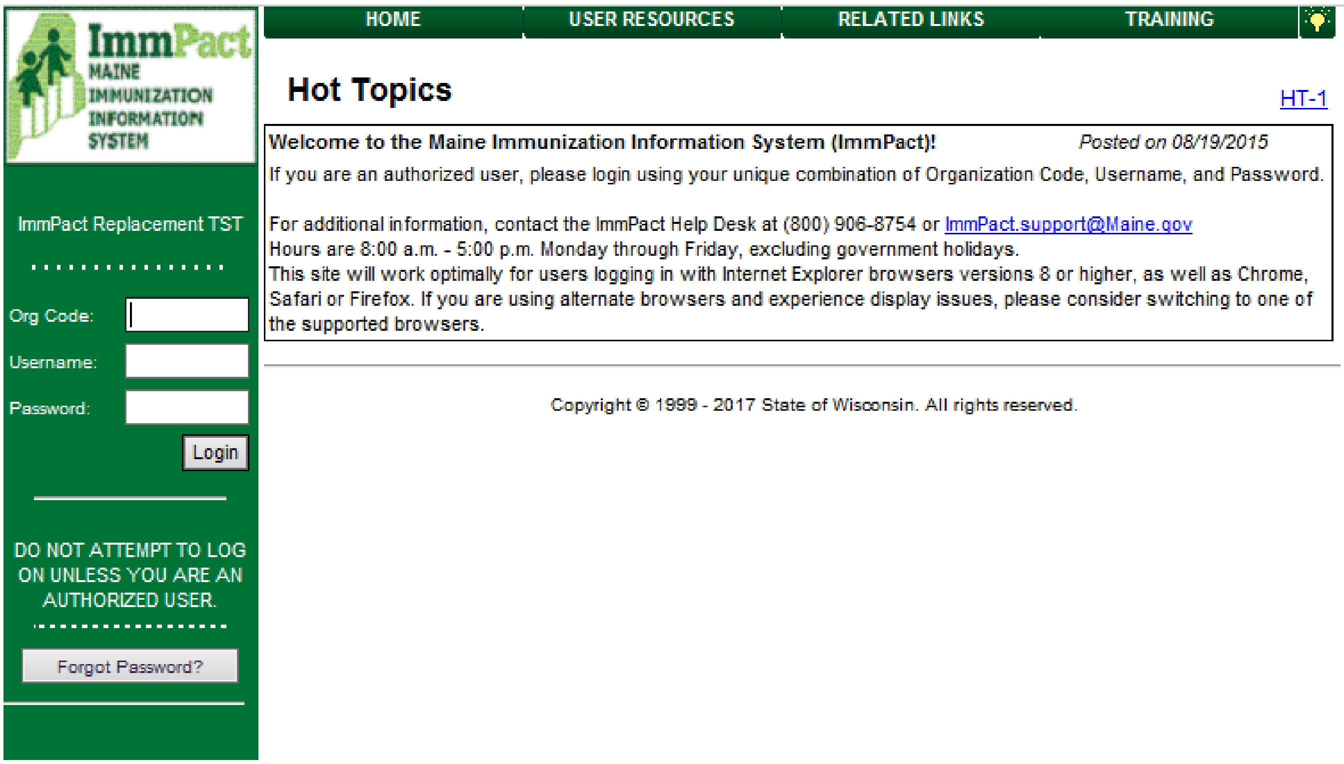
CHAPTER 3: ACCESSING IMMPACT

In this chapter:

Opening ImmPact

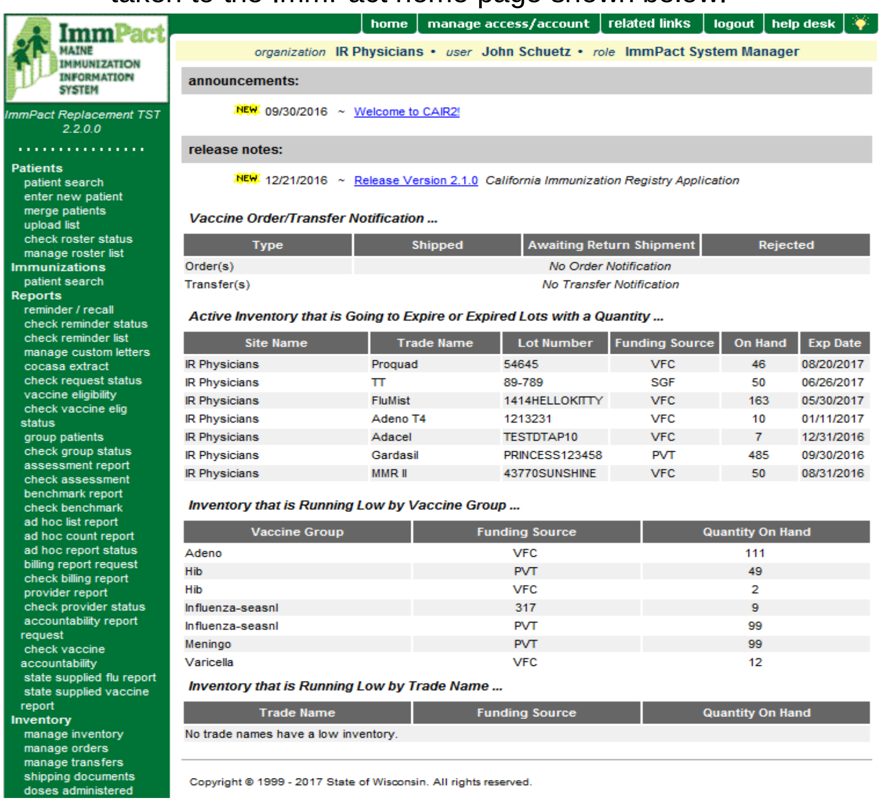
To access the ImmPact Web site, follow these steps:

1. Open any browser.
2. Type the internet address for the ImmPact website, immpact.maine.gov in the address box at the top of the browser. Once this page displays, you may want to save this link in your favorites.

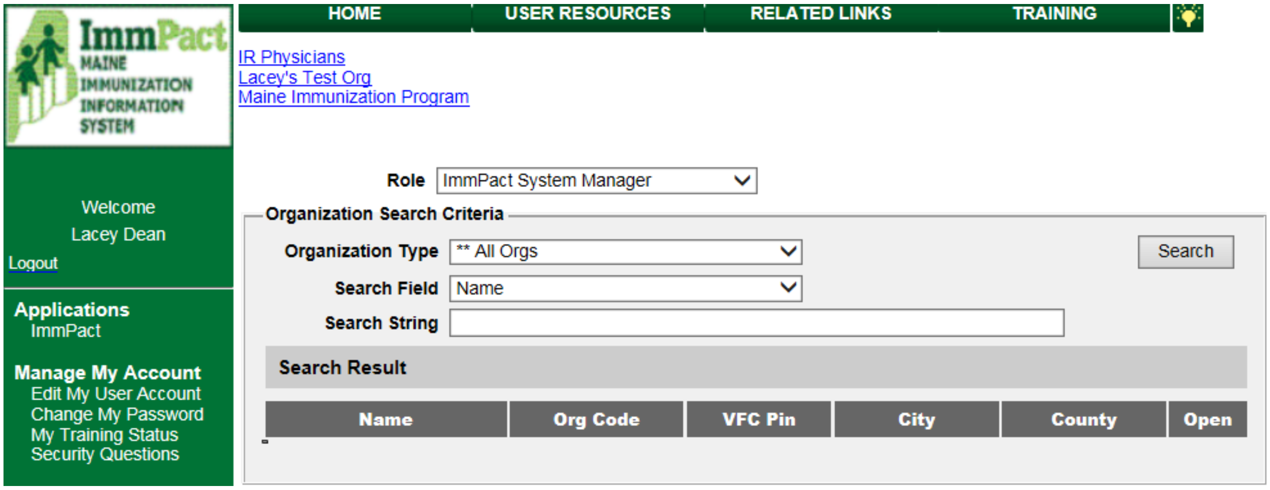


3. On the login page for ImmPact, enter your Organization Code (Org Code), Username and Password. Click the Login button. If you do not know your clinic's Org Code, contact the ImmPact Help Desk at 1-800-906-8754.
4. Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates (click Yes to proceed). Internet Explorer will give you the option of turning off these warnings for future use.

5. The content that displays upon logging into IMMPACT is determined by your individual user rights.
6. User accounts set up with access to one organization will be taken to the ImmPact home page shown below.



7. User accounts set up with access to more than one organization will be taken to the Manage Access/Account screen shown below.



Note: Org Code, Username, and Password are case-sensitive. They must be entered in the exact way you receive them from your organization's administrator or the ImmPact Help Desk.

Post Login

Once in ImmPact, you may access the Manage Access/Account screen to switch organizations, manage users, or manage your own account depending upon the specific role that was assigned to you when your account was set up. To do this, click the Manage Access/Account button at the top of the screen in ImmPact. The Manage Access/Account screen will display. For more information on the functions available on the Manage Access/Account screen, refer to the Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual.

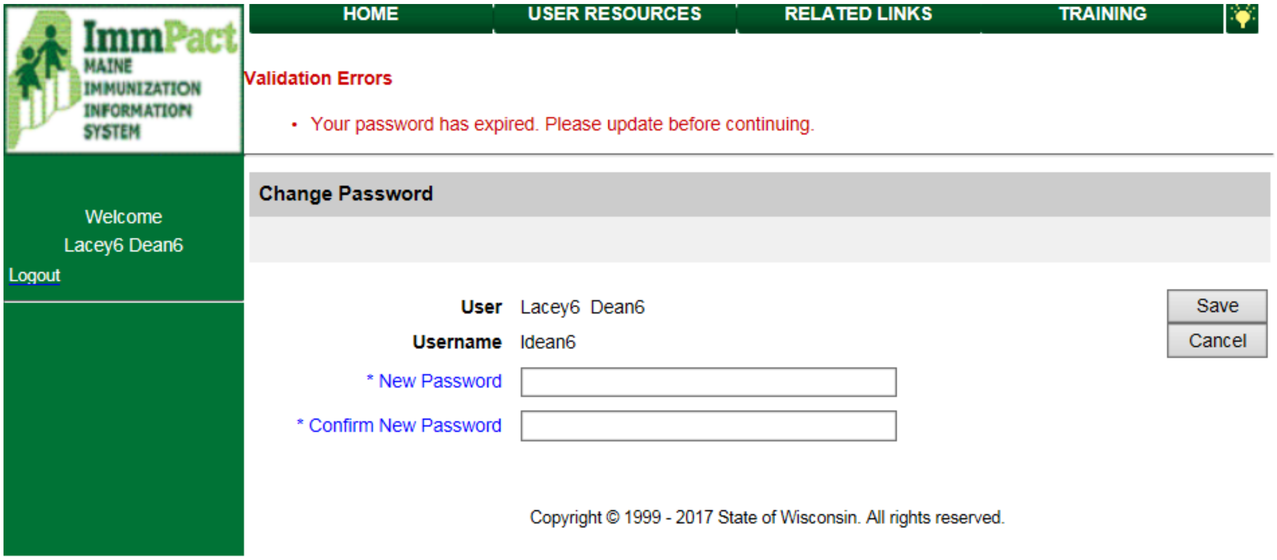
Exiting ImmPact

To exit from the ImmPact application, click the logout button on the menu bar at the top of the ImmPact screen. You may logout in this manner from any screen within ImmPact.

ImmPact Security

ImmPact provides warning messages after one, two, and three unsuccessful login attempts. Upon the third unsuccessful login attempt, ImmPact will lockout the user and require contact with the local system- administrator or ImmPact Helpdesk.

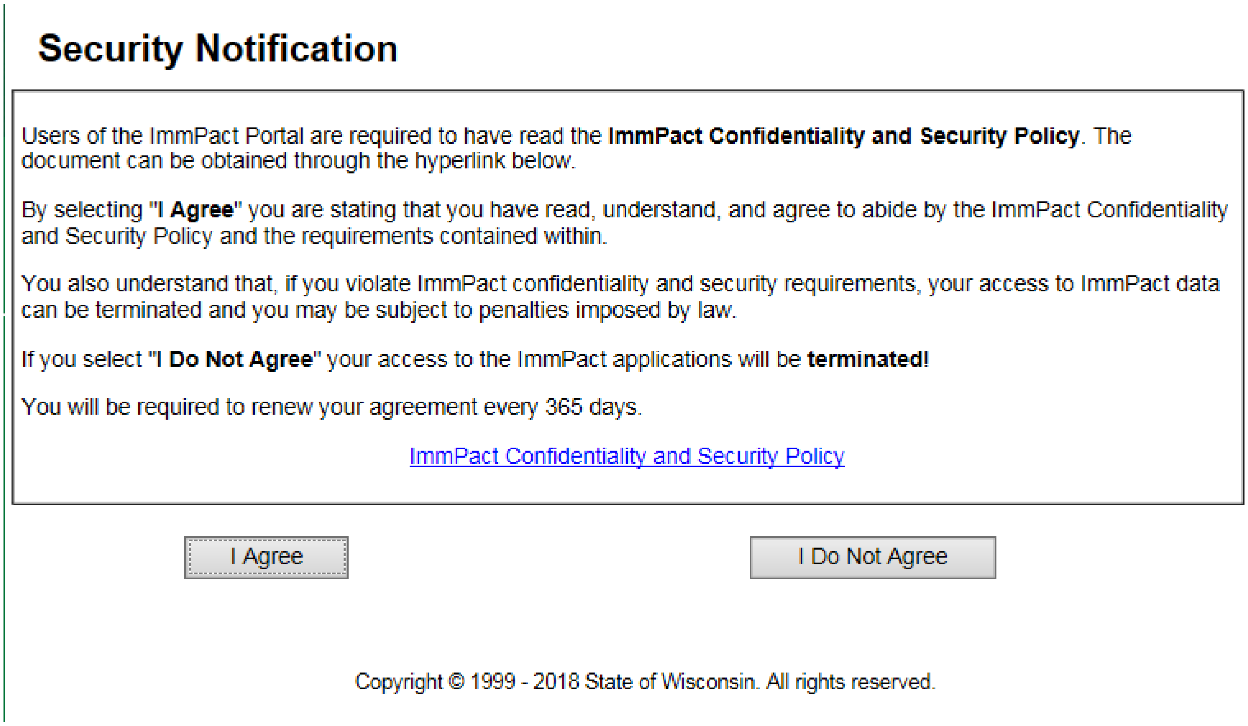
You will be required to change your ImmPact password periodically. ImmPact will display the Change Password screen when your password has expired or has been set or reset by your local system administrator or the ImmPact Helpdesk.



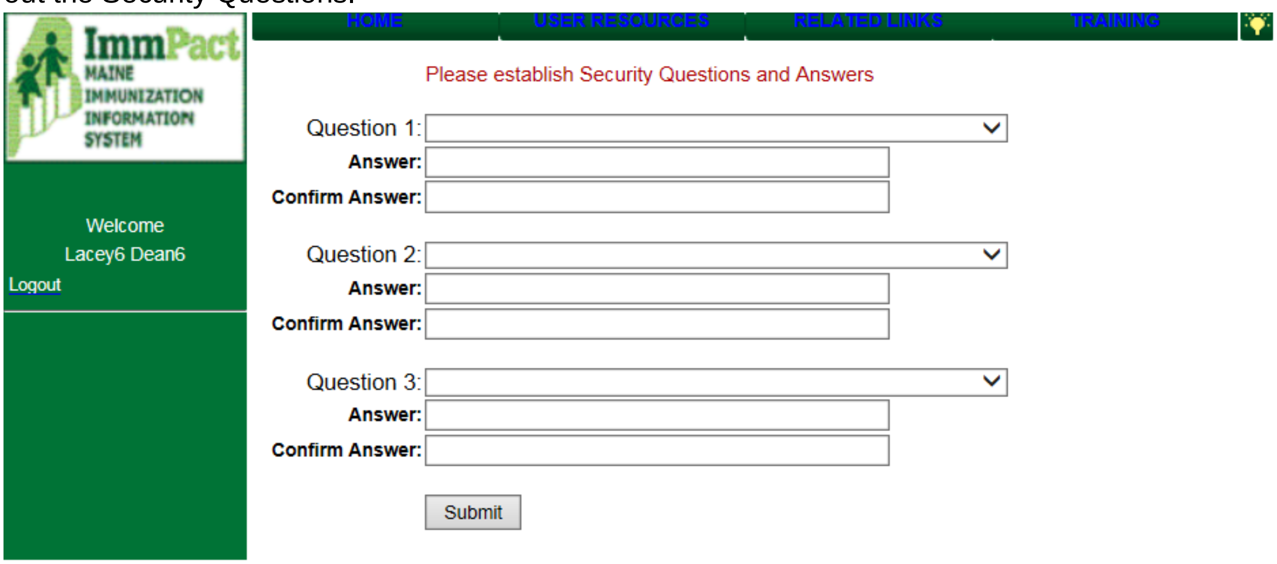
Note: Each person that will be accessing ImmPact is required to have their own user account. ImmPact accounts must not be shared.

ImmPact IIS Security Questions

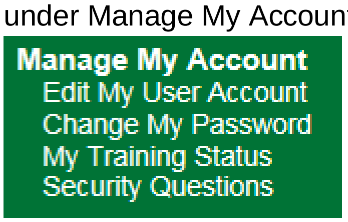
1. Upon login, new ImmPact Users will be required to fill out 3 Security Questions in order to use the Forget Password option.
2. When the user first logs into the ImmPact application they will see the Security Notification and are required to agree in order to proceed with using the application.



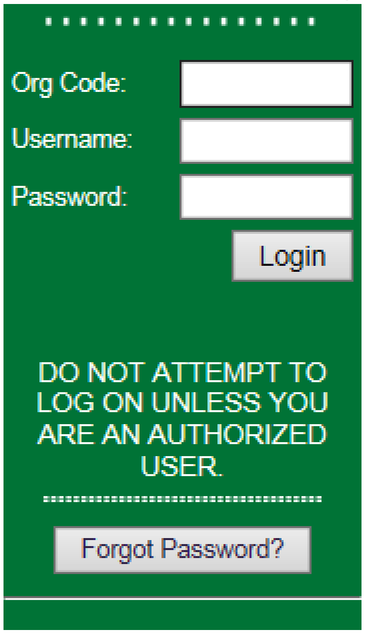
3. When the user clicks “I agree” and then changes their password, they are prompted to fill out the Security Questions.



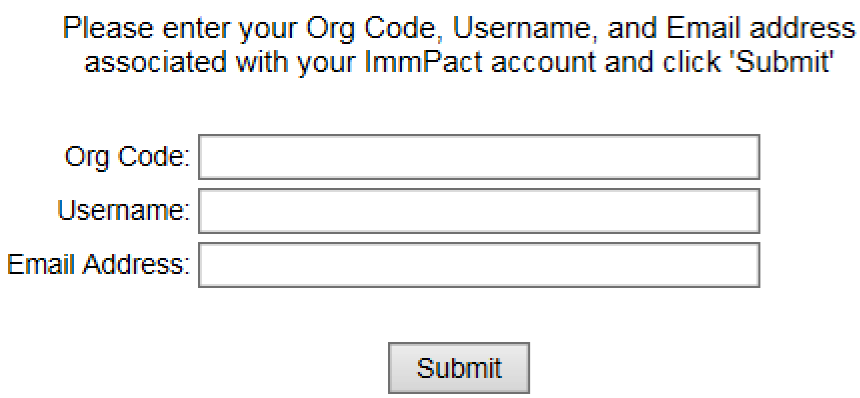
4. The user will have to fill out three distinct questions from the dropdown lists
   a. Each Answer needs to be a minimum of one character
   b. Each Answer needs to be unique and different from any other answers to previous questions.
5. The user can update these questions any time by clicking on the Security Questions link under Manage My Account.



6. If a user forgets their password to log into ImmPact, they can click on the Forgot Password button on the ImmPact Login Page.



7. The user will be prompted to enter their Org Code, Username and Email Address.
   a. The users correct email address must be on file with ImmPact with their user credentials or they will not be able to utilize this feature.



8. The user will then be sent a URL to their email account and they will be directed to change their password within ImmPact.

CHAPTER 4: OPTIMIZING IMMPACT

In this chapter:

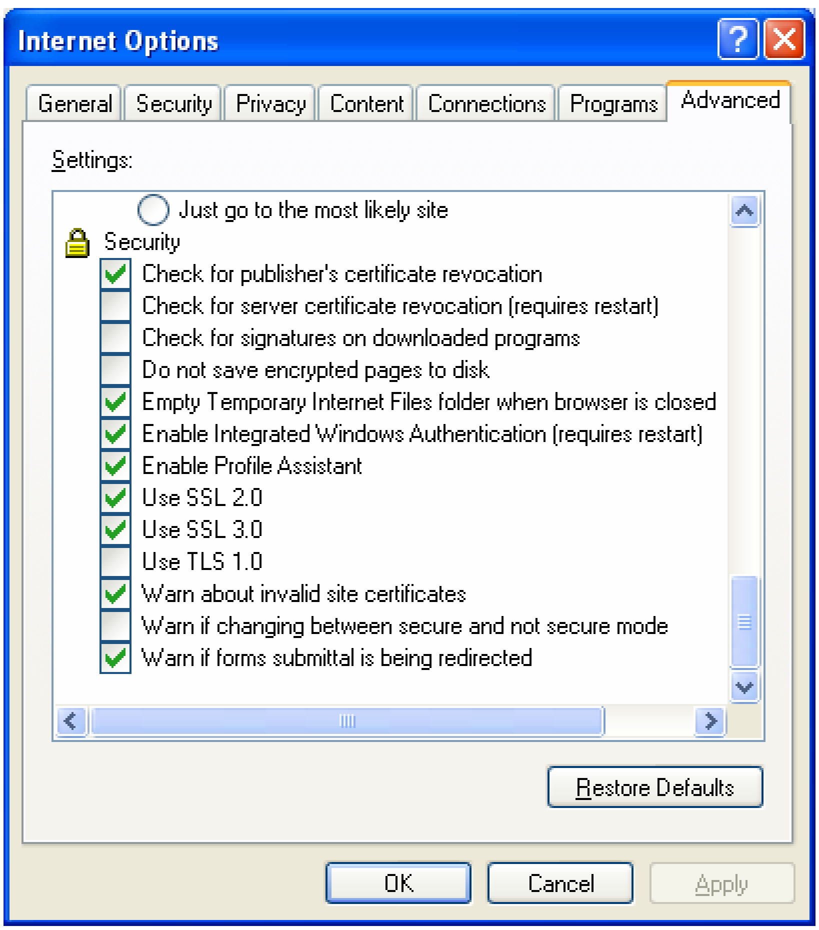
OPTIMIZING BROWSER PERFORMANCE

Your Internet browser automatically saves a copy of each new web page visited to the computer's hard drive by default. Over time, these saved files can slow down the browser's performance. This potential problem is avoided by changing browser settings to automatically delete the temporary Internet files each time the browser is closed.

Deleting Temporary Internet Files (Internet Explorer)

To automatically delete all temporary Internet files each time Internet Explorer is closed:

1. Click **Tools** on your browser's menu bar.
2. Click **Internet Options**.
3. Click the **Advanced** tab.



4. Scroll to the **Security** heading and check the box next to the command, “Empty Temporary Internet Files folder when browser is closed”.
5. Click **OK**.

Operating in Full-Screen Mode (Internet Explorer)

To view most elements of ImmPact with a minimal amount of scrolling, change the browser to full screen mode by pressing F11 on the keyboard. This mode allows minimal browser commands and maximum viewing area for ImmPact. To return to normal screen mode, press F11 again.

RUNNING REPORTS WITH ADOBE ACROBAT READER®

ImmPact uses at a minimum Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Click “Run the file” and “Do not display this message again”.

If you try to print a report in Acrobat® and find that some of the text is illegible, choose File, Preferences and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the “Smooth Text and Images” box is checked.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a Rubik’s cube and the report does not display Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Click the Start button on the lower left corner of your computer screen
2. Click Programs
3. Click Adobe Acrobat® 6.0
4. On the Acrobat Reader® menu bar, click on File
5. Choose Preferences
6. Choose General
7. Under Options, uncheck Web Browser Integration
8. Click OK

Try to run your report again. If you continue to have problems, contact the ImmPact Help Desk at (800) 906-8754.

EFFICIENT SCREEN NAVIGATION

Microsoft Windows® often allows users several ways to accomplish certain tasks. Because ImmPact runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in ImmPact, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

Keyboard Shortcuts in ImmPact

Deleting data: When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you press the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.

Tab: The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.

Shift+Tab: Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the web page.

Enter: In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc. However, you should always confirm that you have clicked the “Save” button if needed to retain any changes or updates you have made to the system.

← (Left Arrow): The left arrow key moves the cursor one character to the left.

→ (Right Arrow): The right arrow key moves the cursor one character to the right.

Ctrl+←: Holding the Ctrl key and pressing the left arrow key moves the cursor one word to the left.

Ctrl+→: Holding the Ctrl key and pressing the right arrow key moves the cursor one word to the right.

Ctrl+A: Holding down the Ctrl key and pressing the A key will select all the text in the current field.

Ctrl+C: Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.

Ctrl+V: Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.

Ctrl+X: Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.

Delete: The Delete key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.

Backspace: The Backspace key deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.

Home: The Home key positions the cursor to the left of the first character in the field.

End: The End key positions the cursor to the right of the last character in the field.

Shift: Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.

Mouse Shortcuts in ImmPact

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double-clicking in a field: When a field contains one-character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple-clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right-clicking in a field: When you right-click in a field, ImmPact displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu or toolbar options are as follows:

Undo: Selecting the Undo option reverses your last action. Undo may be repeated several times.

Cut: Selecting the Cut option deletes all highlighted text in the current field and places it on the clipboard.

Copy: Selecting the Copy option duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.

Paste: Selecting the Paste option inserts the contents of the clipboard into the current field.

Delete: Selecting the Delete option removes the highlighted text without placing it on the clipboard.

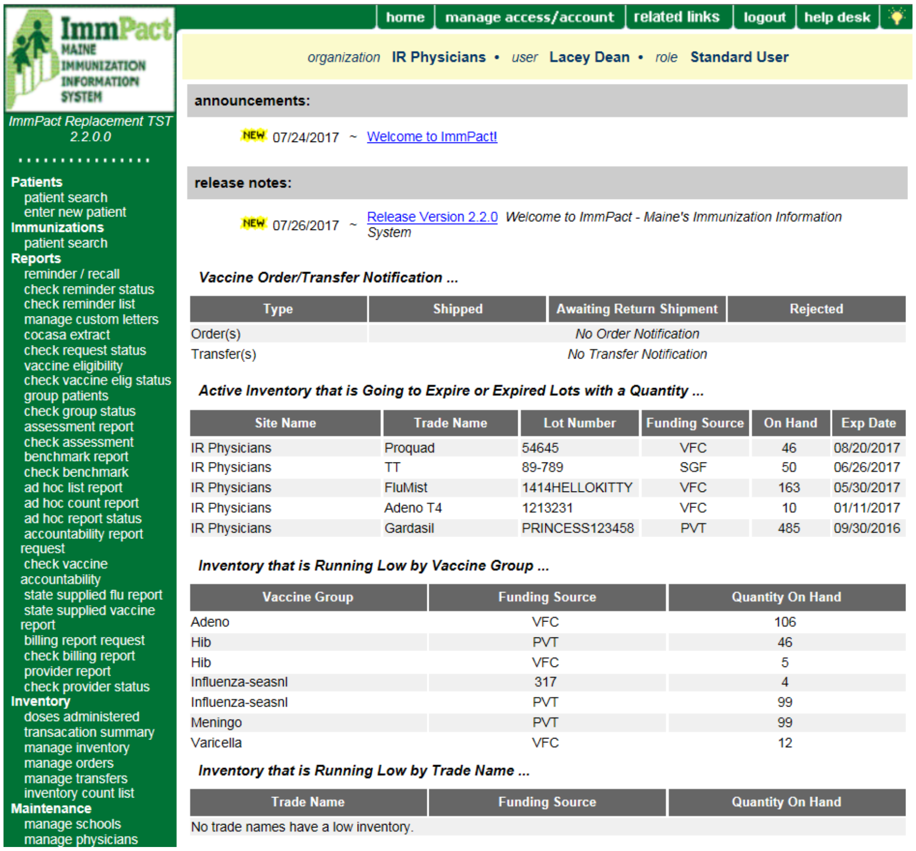
Select All: Selecting the Select All option highlights all text in the current field.

CHAPTER 5: HOME PAGE

In this chapter:

To access the ImmPact home page please follow the instructions outlined in the Chapter 3 of the ImmPact User Manual.

The home page of ImmPact is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the ImmPact screen to view all sections of the home page.



MENU BAR

At the top of the page, you have several menu options. These menu options will appear on every page within ImmPact. The options available are the following:

Home: Clicking this menu option will return you to the ImmPact home page from anywhere in the application.

Manage Access/Account: Clicking this menu option will bring you to the Manage Access/Account page. Here you may switch organizations, manage your account, manage access to other accounts, and manage training. Refer to Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual for more information on these functions.

Related Links: Clicking this menu option displays links to other web sites that contain information of interest to the immunization community.

Logout: Clicking this menu option will log you out of your current ImmPact session. You may logout from any screen within ImmPact. The system then gives you the option to return to login to ImmPact.

Help Desk: Clicking the Help Desk menu option will give you a screen with contact information for the ImmPact Help Desk.

Online Help: Clicking the light bulb brings up page-specific help. Refer to the Appendix of this manual for more information about online help.

Directly below the menu bar is a row of information highlighted in light yellow. This row contains your organization's name, your first and last name, and your role within ImmPact for your organization. If any of this information is incorrect contact your organization's Super User or Vaccine Coordinator (or Help Desk if your site does not have a Super User)-The Super User should refer to Managing Users and Organizations (Chapter 6) for instructions on revising organization and user information.

MENU PANEL

The menu panel is green and appears on the left side of all screens within ImmPact.

Menu Selections

These links are used to navigate the ImmPact application. They are grouped under categories such as: Patients, Immunizations, Reports, Inventory and others. To perform a function in ImmPact click on the appropriate link. Your role will determine your access to these functions.

Announcements

The center portion of the home page contains important information on enhancements and maintenance relating to ImmPact. Announcements that have not been viewed will be marked "New". To view a full announcement:

1. Click the underlined announcement title. The ImmPact Announcement screen will display the details and the posting date.
2. Click the Return to Main Page link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of ImmPact. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts

The inventory alerts section will appear on the ImmPact home page under the Release Notes section. This section consists of four tables.

- The first table, *Vaccine Order/Transfer Notification,* lists orders/transfers that have been shipped, are awaiting return shipment, or have been rejected.
- The second table, *Active Inventory That is Going to Expire or Expired Lots with a Quantity*, lists vaccines that are going to expire (within 30 days is the default setting) as well as lots which have expired and still have a quantity.
- The third table, *Inventory that is Running Low by Vaccine Group*, lists inventory that is nearly depleted by vaccine group.
- The fourth table, *Inventory that is Running Low by Trade Name,* lists inventory that is nearly depleted by trade name.

CHAPTER 6: MANAGING USERS & ORGANIZATIONS

In this chapter:

The Manage Access function allows the ImmPact System Administrator (state level) and Super User (clinic level) to add and update information on both users and their organization(s).

Standard Users are able to update their own user information using the Manage My Account function. See Chapter 7 of this manual for more information.

USER ROLES

ImmPact is set up to accommodate a variety of user types. Each user will have access to certain features in the application based on the role that is assigned. The roles or levels of access for ImmPact are hierarchical as follows:

- **ImmPact System Manager**: This is a state user role for ImmPact Help Desk and Vaccine Management.

- **MIP Operations:** This user is a state user role for health educators and other MIP staff.
- **Vaccine Coordinator:** This is also considered the "organization super user" and has access to the portal to set up users. This user has access to view and enter patients, run both individual and organization-level reports, manage the organization's inventory and cold chain, manage clinic events. And Provider Agreement.
- **Standard User:** The standard user adds, edits and finds patients; manages immunization information; sets up and maintains the organization's ImmPact Inventory and Cold Chain and generates both patient-specific and organizational-level reports.
- **Reports Only:** This user has access to view and edit patient immunization histories and includes the capability to run reports.
- **Limited Entry:** This user has" access to view and edit patient immunization records.

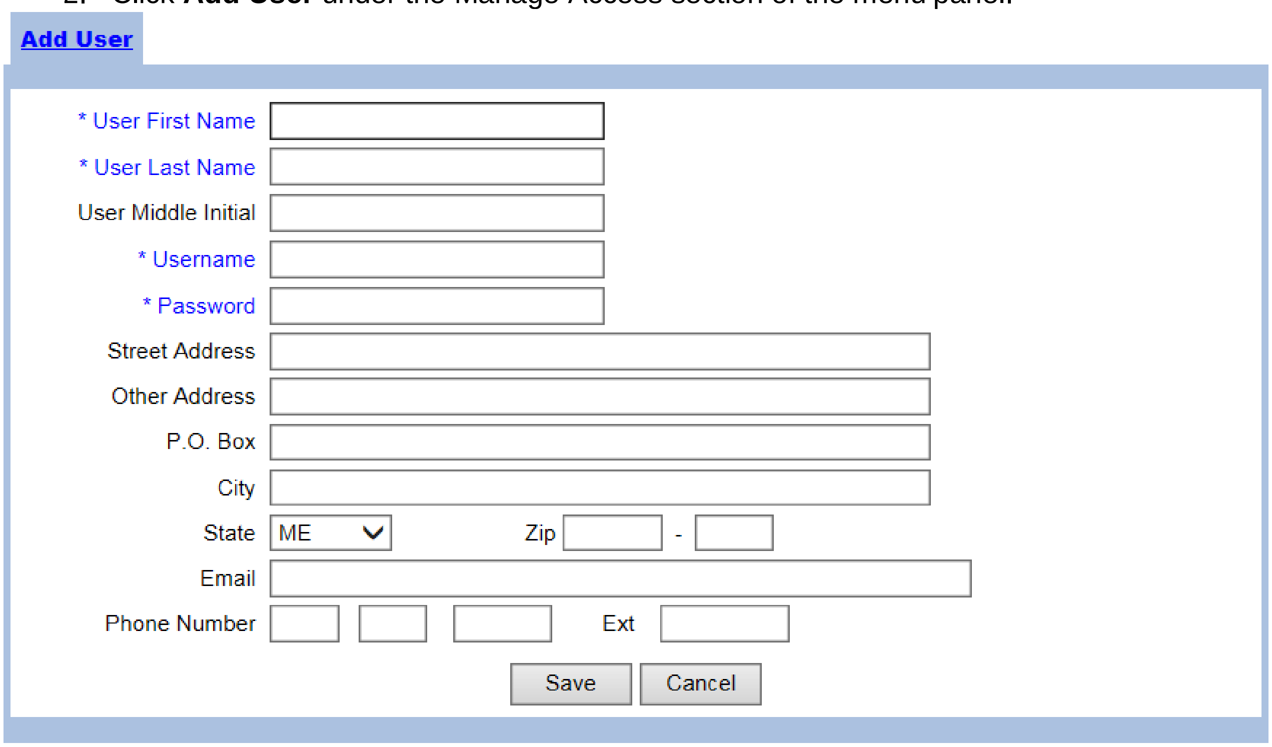
Note: Required fields have asterisks and display in blue text. Input fields not shown in blue are optional, although we strongly recommend that an email address be included in every ImmPact user account.

Adding Users

Super Users are responsible for adding additional users to their organizations.

To add a user to ImmPact:

1. Click the **Manage Access/Account** tab at the top of the ImmPact home page.
2. Click **Add User** under the Manage Access section of the menu panel.



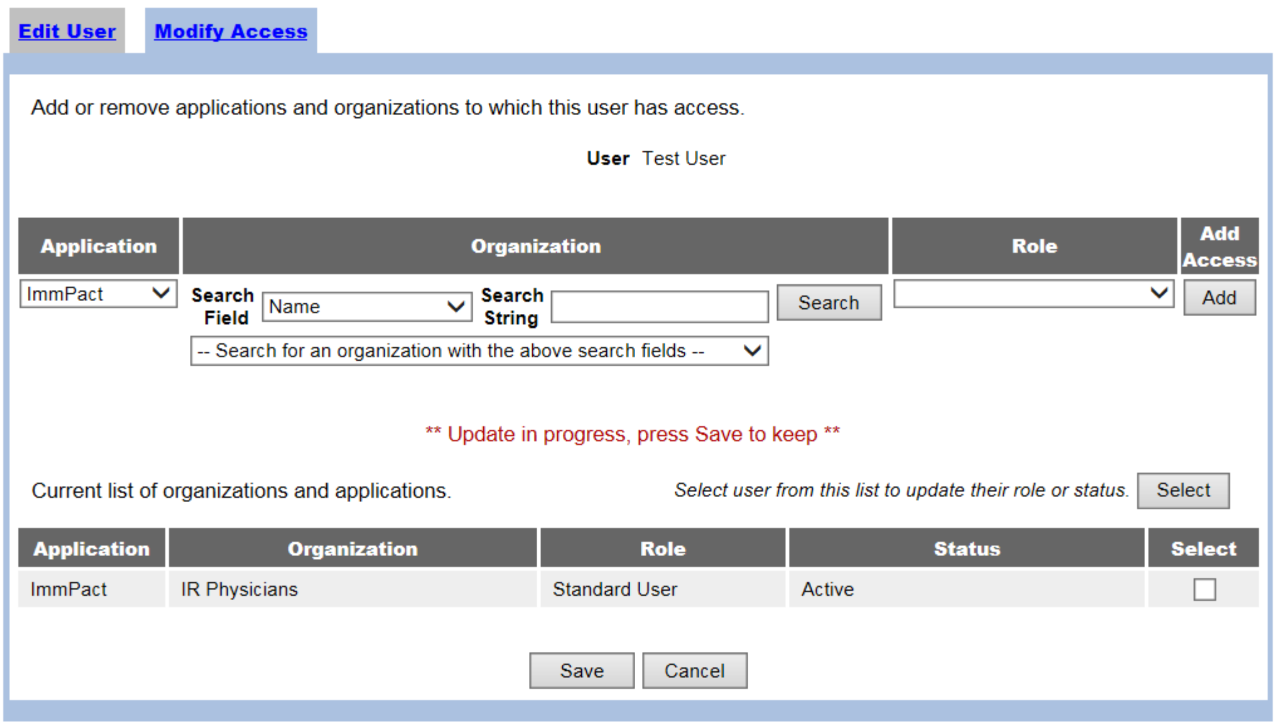
3. You must enter the user's First and Last Name and assign a Username and Password.
4. Enter additional information if available.

5. Click the **Save** button
6. Once a user is successfully saved in the database, the following message will be displayed at the top of the Edit User screen:
7. “User Added, please proceed to the Modify Access Tab. User does not have access until you do.”

Modifying Access

After adding a user, you must complete the **Modify Access** screen to assign the user access to the appropriate organization. To give a user access:

1. At the Edit User screen, click the **Modify Access** tab.



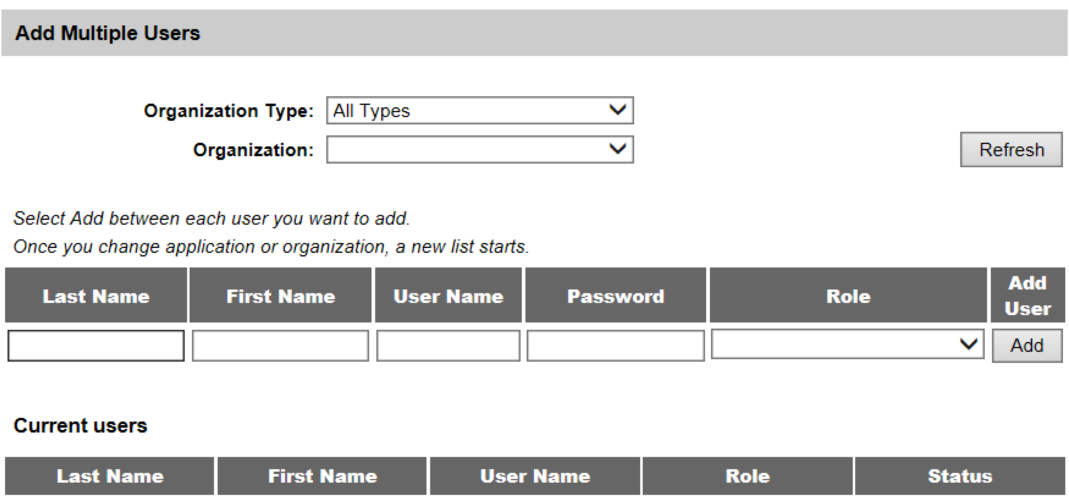
2. Working left to right, start by selecting the ImmPact Application.
3. Select the appropriate Organization type to minimize the Organization drop down list. If Organization Type is unknown leave as “All Types”. If you are a super user for a single organization, you will only have the option of choosing your organization.
4. Select the user’s organization from the drop-down list.
5. Select the appropriate role for the new user.
6. Click the **Add** button under Add Access. (For some user roles, a second user role will automatically be added for accessing the Portal Application.)
7. Click the **Save** button when you have finished entering access information for this user.

Note: If you give a user access to more than one organization, he or she will need to select a specific organization to access upon logging in.

Adding Multiple Users

ImmPact System Managers, MIP Operations and Vaccine Coordinator users also have the option of adding multiple standard users at once for their organization. This is the quickest way to set-up standard user accounts. To add multiple standard users, follow these steps:

1. Click the **Manage Access/Account** button at the top of the ImmPact Home Page.
2. Click **Add Multiple Users** under the Manage Access section of the menu panel.
3. On the Add Multiple Users screen, click ImmPact from Application drop-down list and then click your organization's name from the Organization drop down list. You can narrow down this list by selecting an organization type in the Organization Type drop down list. If you do not see your organization's name in this field contact the ImmPact Help Desk for assistance.



4. You must enter the First and Last Names, and assign Username, Password, and Role.
5. Click the **Add** button.
6. Follow Steps 3-5 for each additional user.
7. When finished adding the last user, you may return to the ImmPact home page by clicking on the ImmPact link under the Applications

section of the menu panel. Although email address is not available to enter when adding multiple users, we strongly recommend that each individual user navigate to “Edit my user account” and add their email address to their user information.

Note: Org Code, Username, and passwords are case sensitive.

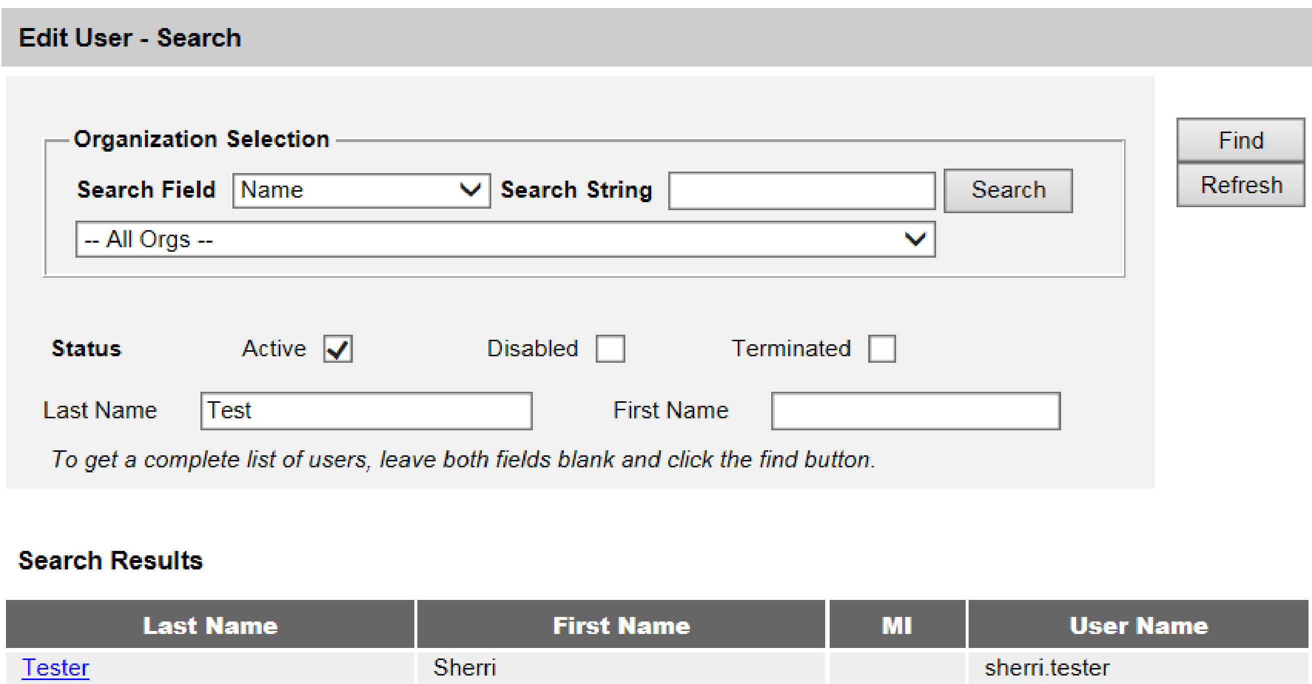
Maintaining Users

ImmPact allows ImmPact System Managers, MIP Operations and Vaccine Coordinator Users to edit user accounts for their organization(s).

Finding Users

To find a user account within your organization:

1. Click the **Manage Access/Account** tab at the top of the ImmPact home page.
2. Click **Edit User** under the Manage Access section of the menu panel.



3. At the Edit User - Search screen, select the user’s organization from the Organization drop-down list. If you are associated with only one organization, ImmPact will default to your organization’s name. If you are associated with multiple organizations, select the appropriate organization before moving on to Step 4.

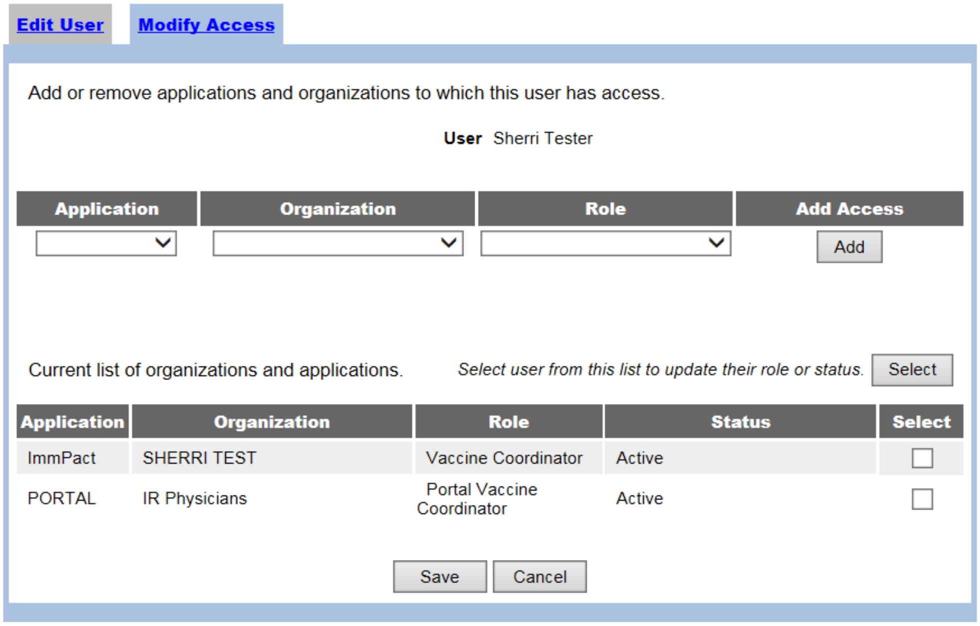
4. Select the Status of the user you are searching for in ImmPact. The Status field will always default to Active. This means ImmPact will only search and find active users for your organization. If you are searching for Disabled and Terminated user accounts, select the appropriate box before moving on to Step 5. If you are unsure of the user's status, select all three.
5. Enter the Last and/or First Name of the user for whom you are searching. Leaving both fields blank will bring up a complete list of users associated with your organization.
6. Click the **Find** button.
7. All names matching the search criteria will be listed under the Search Results portion of the screen. Click the user's last name to display the Edit User page for a specific user.

Note: If a user has not accessed ImmPact for 90 days or more the user's account is automatically disabled. The Super User will need to change the user's status to active on the Modify Access tab.

Editing Users

The Edit User function allows you to change any previously entered information about a user, including their status (active, disabled or terminated). To edit user information:

1. After completing steps outlined above in Finding Users, click the user's last name (which is a hyperlink) to access the Edit User screen. You may also click Edit User on the menu bar, and search for and select a specific user.
2. Edit appropriate user information.
3. Click the **Save** button.
4. Once a user is successfully saved in the database "User Updated" will appear at the top of the Edit User screen.
5. Click the **Modify Access** tab to modify the user's access.



6. To edit current access, check the **Select** box for the access to be edited. Click the **Select** button.
7. Update the user's role and/or status for the selected access and click the **Update** button.
8. Once a user's access is updated, "Update in progress, press Save to keep" will appear within the Modify Access page.
9. Click the **Save** button. "User Updated" displays at the top of the page.

EDITING ORGANIZATIONS

ImmPact System Managers, MIP Operations and Vaccine Coordinators may also edit their organization information by:

1. Click the **Manage Access/Account** tab at the top of the ImmPact home page.
2. Click **Edit Organization** under the Manage Access section of the menu panel.
3. Click the organization's name you wish to edit (which is a hyperlink). An asterisk before the organization's name indicates that it is the parent organization.
4. Enter updates to organization information. Display-only fields can only be updated by contacting the ImmPact Helpdesk at 1-800-906-8754.
5. Click the **Save** button. The message "Organization Updated" will display at the top of the screen. For additional information regarding editing organizational information, contact the ImmPact Help Desk at 1-800-906-8754.

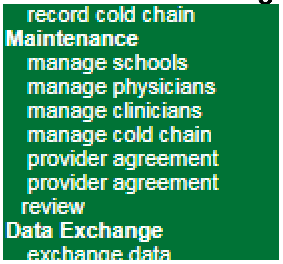
IMMPACT PROVIDER AGREEMENT

Every two years provider organizations using ImmPact are required to complete a Provider Agreement. A completed Provider Agreement is necessary if the provider organization wants to order VFC vaccines or reconcile their inventory. For a provider organization to complete a Provider Agreement, they must have the following in ImmPact:

- A VFC PIN (**Edit Org** screen)
- A physical address (**Edit Org** screen)
- A mailing address (**Edit Org** screen)
- A vaccine delivery address (**Edit Org** screen)
- At least one physician associated with the provider organization (added from the **Manage Physicians** screen)

Use the following process to complete a new Provider Agreement:

1. Click **Provider Agreement** under the Maintenance section of the menu panel.



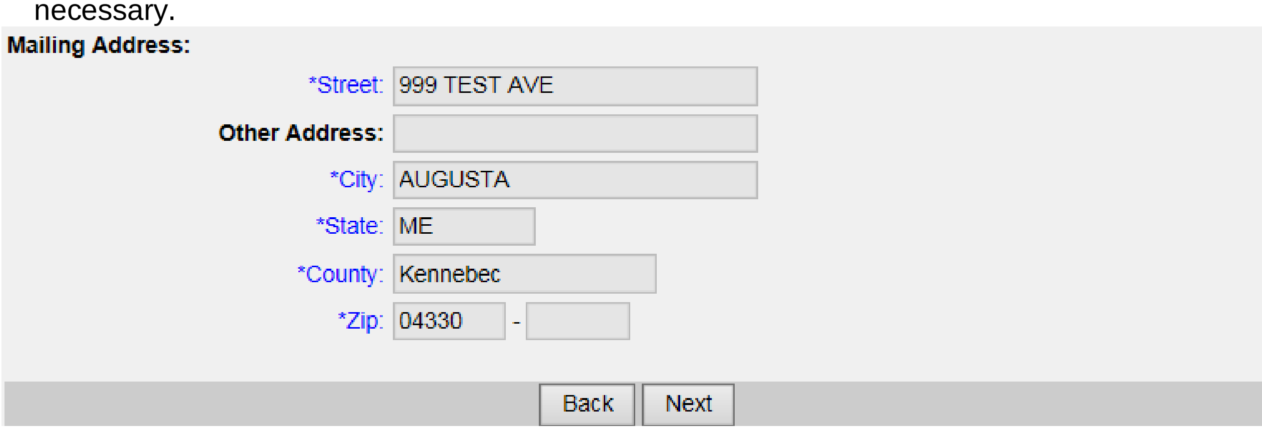
2. On the **Provider Agreement** screen click on the hyperlink “Create New <calendar year> Agreement.”

Provider Agreements:

Create New 2017 Agreement

PDF - Full	PDF - Signature Page	Last Updated	Approval Status	State Comments
2015 PDF	PDF Signature	02/06/2015	Approved	1/5/15 Agreement approved. Medical license numbers and exclusion list verified. JDemers changed a delivery day to closed. smp
2014 PDF	PDF Signature	05/05/2014	Approved	1/6/14 - Approved agreement. Exclusion list & medical license numbers verified. JDemers
2013 PDF	PDF Signature	06/12/2013	Approved	Signature pages rec'd and agreement approved 1/4/13- JM
2012 PDF	PDF Signature	01/01/2012	Approved	12/20/11 Reviewed storage & handling plan. Agreement approved. JD
2011 PDF	PDF Signature	04/05/2011	Approved	12/9/2010 approved provider agreement J. Demers
2010 PDF	PDF Signature	06/21/2010	Approved	KM 6/21/10

3. Use the **Next** and **Back** buttons to scroll through the new Provider Agreement. Verify the information that is auto-populated is correct or complete the required information where necessary.



4. When the user is done completing the Provider Agreement, to send it for approval by the state of Maine, they should click the **Save & Submit** button at the end of the Provider Agreement.

When the Provider Agreement is completed, the user's organization does not have to complete another Provider Agreement for two years, unless the following occurs:

- Organization modifies the VFC Pin number (**Edit Org** screen)
- Organization modifies the Organization Name (**Edit Org** screen)
- Organization deletes the physician designated in the Provider Agreement as the Medical Director (**Edit Physician** screen)
- Organization modifies "Delivery Days and Times" (**Edit Org** screen)
- Organization modifies "Main Contact Information" for the "Physical," "Mailing," and "Vaccine Delivery" addresses, or edits/deletes the "Vaccine Delivery" contact (**Edit Org** screen)

If one of these situations occurs, the Provider Agreement will revert to 'In Progress' status and the user will need to return to the **Provider Agreement** screen and update the Provider Agreement for the current year. The organization will not be able to place an order or complete a transfer until the Provider Agreement is back in an 'Approved' status.

Note: If the user wishes to review a previous year's Provider Agreement, they should click on the hyperlink under "PDF – Full" or "PDF – Signature Page" for the calendar year they wish to review on the Provider Agreement screen.

CHAPTER 7: MANAGING MY ACCOUNT

In this chapter:

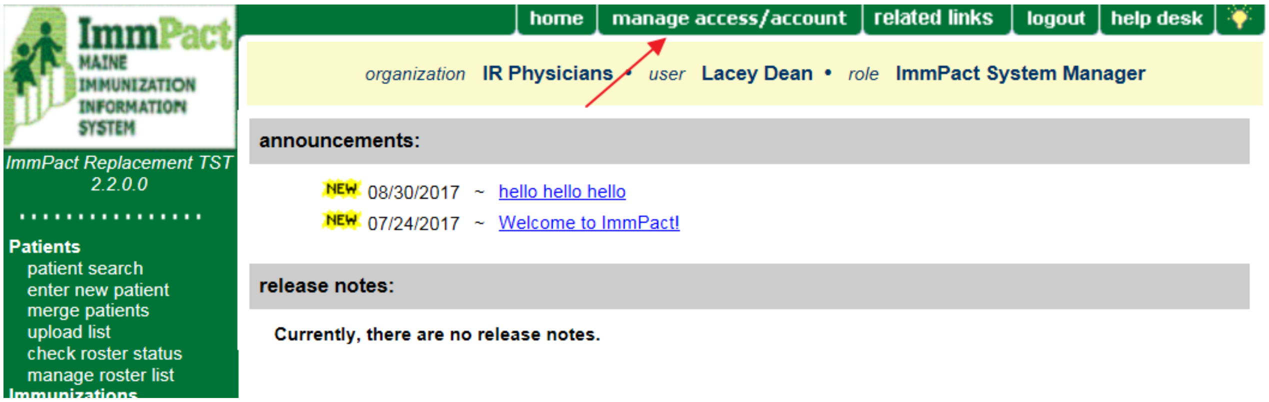
Editing User Information

EDITING USER INFORMATION

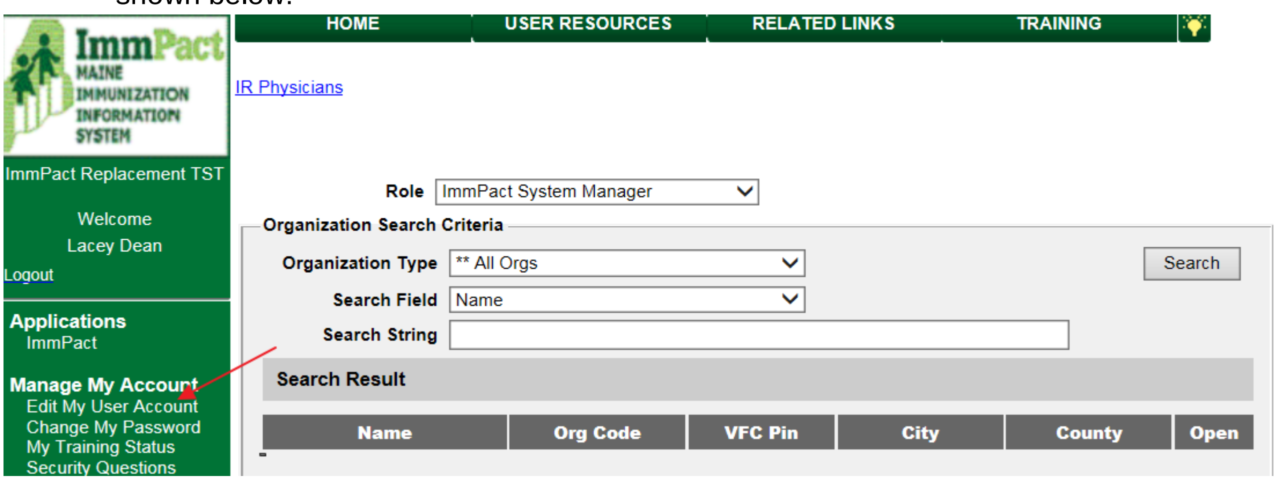
Editing My User Account

ImmPact allows all users to manage their own user account information.

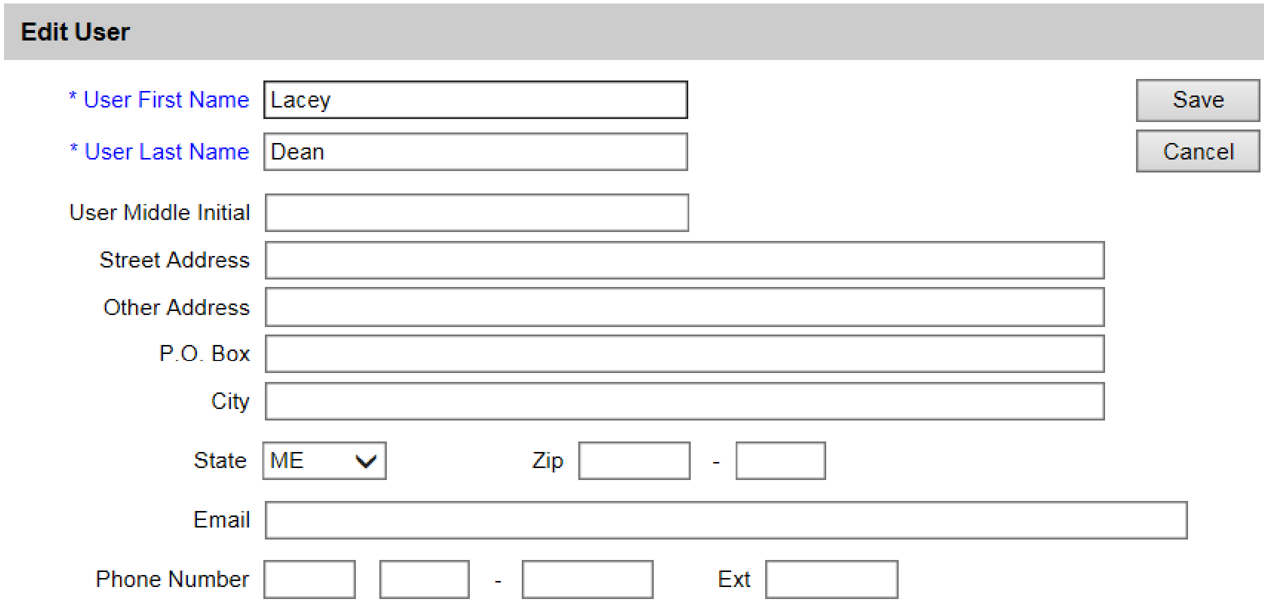
1. Click the **Manage Access/Account** tab on the ImmPact home page header.



2. Under the Manage My Account section of the menu panel, click **Edit My User Account**. This displays the Edit User page, as shown below:



3. Edit your first or last name in the appropriate fields. You may also enter or edit any additional fields as necessary. Verify that your email address or business phone number is correct. We strongly recommend that all users maintain a current email address in the IIS.



4. Click the **Save** button. If changes were made the message, “User Updated” appears on the screen.

Note: The first and last name fields on the Edit User screen are required fields, which is why they show in blue with an asterisk.

CHAPTER 8: MAINTENANCE

In this chapter:

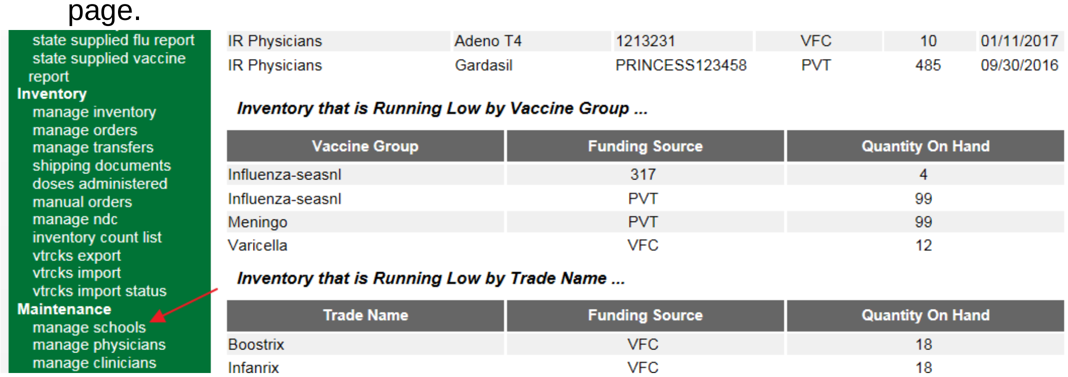
The Maintenance section on the menu panel allows users to add and update information on schools, physicians, and clinicians. Adding and maintaining this information is optional; however, these components will allow clinics to utilize more functionality within the IIS (e.g., generating reports specific to a clinic physician, school, etc.).

MANAGING SCHOOLS

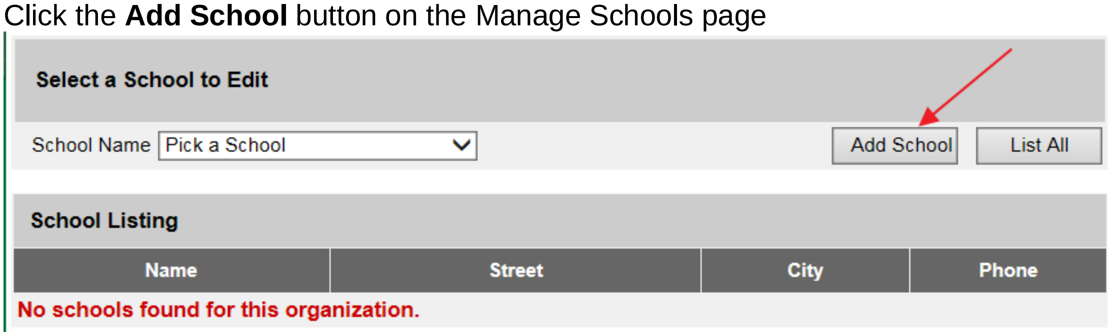
ImmPact users may enter schools and daycare centers in their area using the Manage Schools function. Schools entered using this function will be available for selection from a drop-down list on the Patient Demographic page. Reports may then be generated by school.

Adding Schools

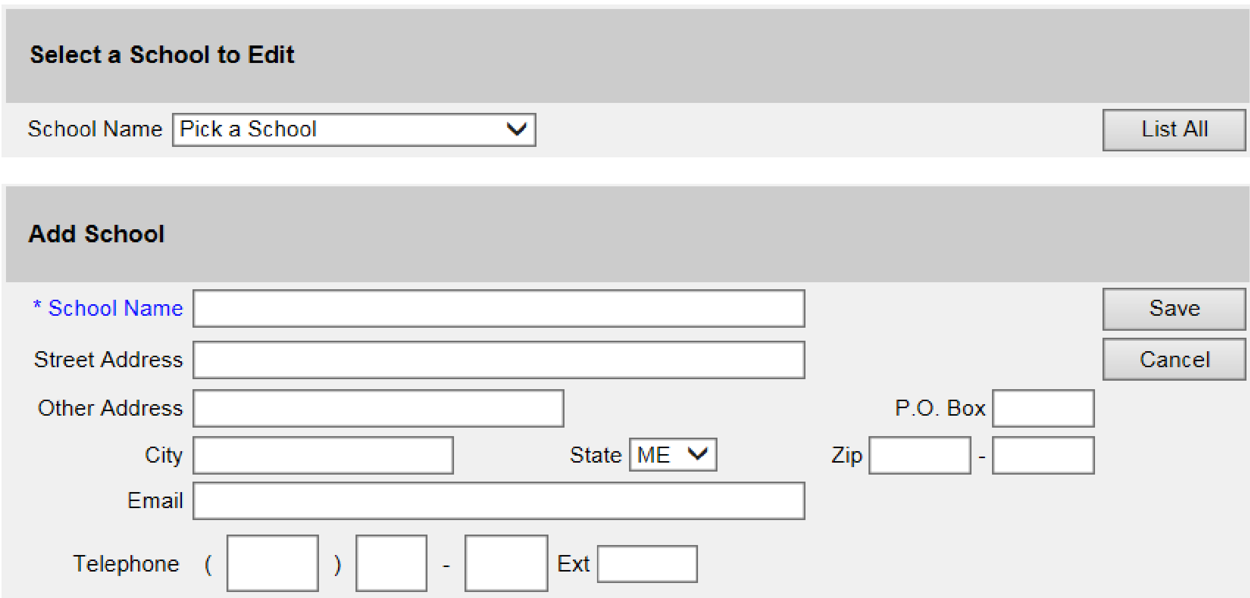
1. Click **Manage Schools** under the Maintenance section of the ImmPact home page.



2. Click the **Add School** button on the Manage Schools page



3. Below the “Add School” header, fill in the name of the school in the appropriate text field. Enter any additional information you wish to supply for the school in the appropriate fields.



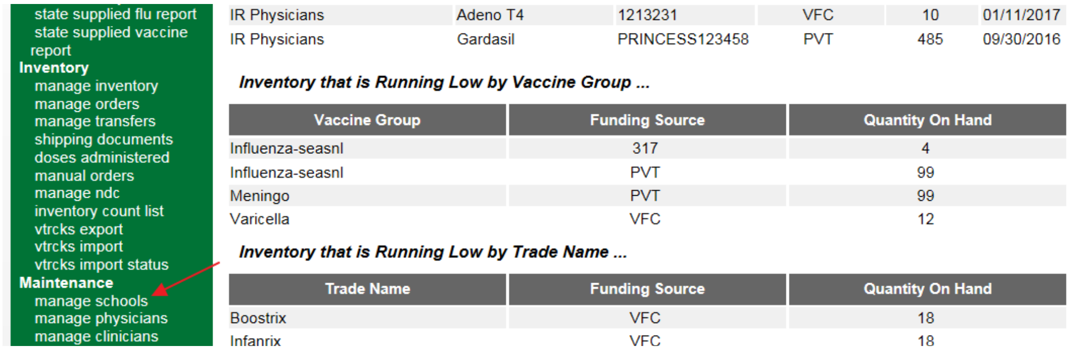
4. Click the **Save** button.
5. Once your school information is successfully saved, “School Added” will appear in the upper right corner of the Edit School box.

Click the **List All** button to return to the Manage Schools screen.

Note: Required fields are shown in blue text.

Editing School Information

1. Click **Manage Schools** under the Maintenance section of the menu panel.



IR Physicians	Adeno T4	1213231	VFC	10	01/11/2017
IR Physicians	Gardasil	PRINCESS123458	PVT	485	09/30/2016

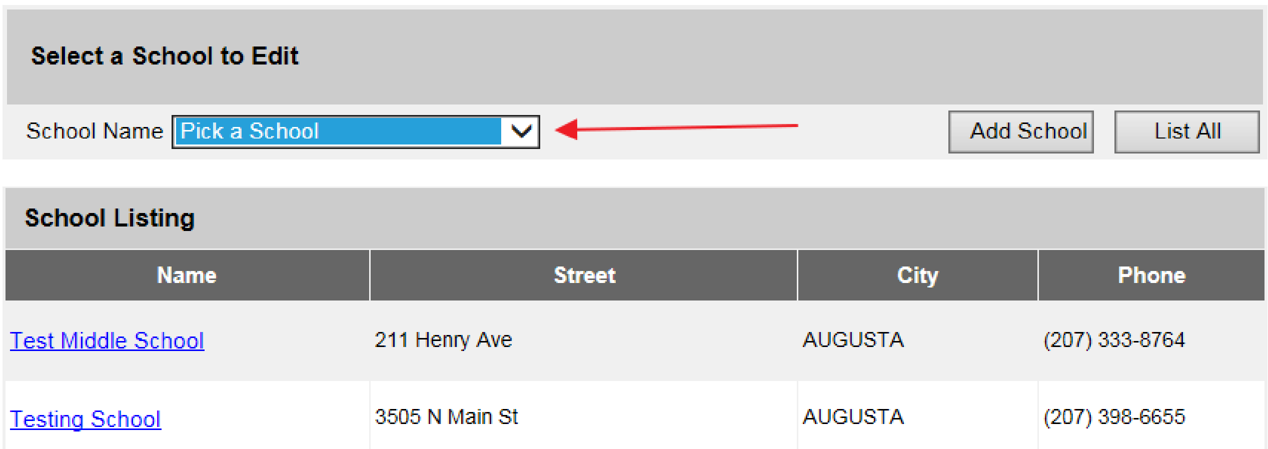
Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Funding Source	Quantity On Hand
Influenza-seasnl	317	4
Influenza-seasnl	PVT	99
Meningo	PVT	99
Varicella	VFC	12

Inventory that is Running Low by Trade Name ...

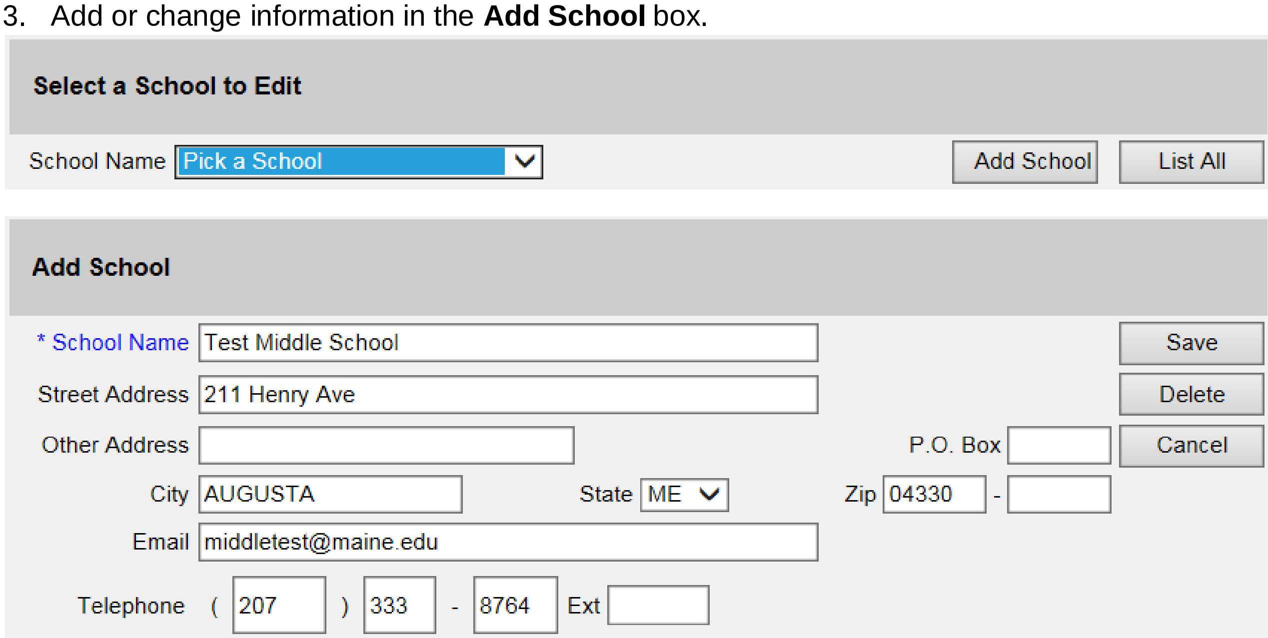
Trade Name	Funding Source	Quantity On Hand
Boostrix	VFC	18
Infanrix	VFC	18

2. On the Manage Schools page, choose the school whose information you would like to edit from the **School Name** drop down list at the top of the page. You may also click the school's name in the School Listing at the bottom of the screen.



Name	Street	City	Phone
Test Middle School	211 Henry Ave	AUGUSTA	(207) 333-8764
Testing School	3505 N Main St	AUGUSTA	(207) 398-6655

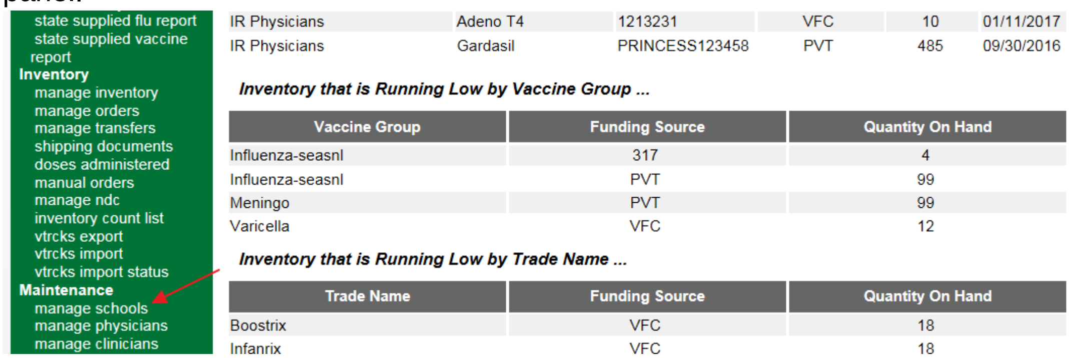
3. Add or change information in the **Add School** box.



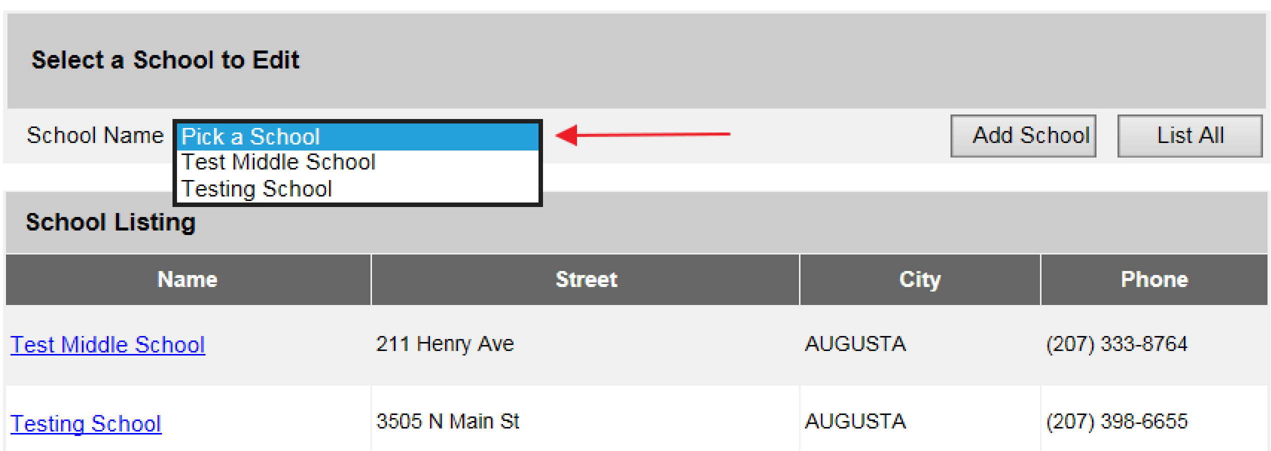
4. Click the **Save** button.
5. Once your changes are successfully saved, “School Updated” will appear in the upper right corner of the box.
6. Click the **Cancel** button twice, or the List All button to return to the Manage Schools screen.

Deleting Schools

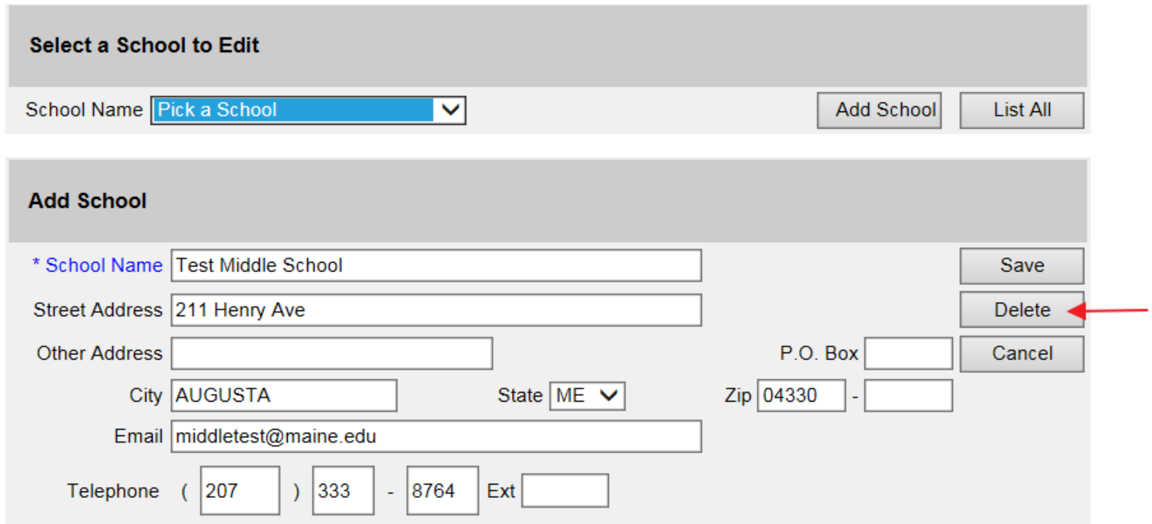
1. Click **Manage Schools** under the Maintenance section of the menu panel.



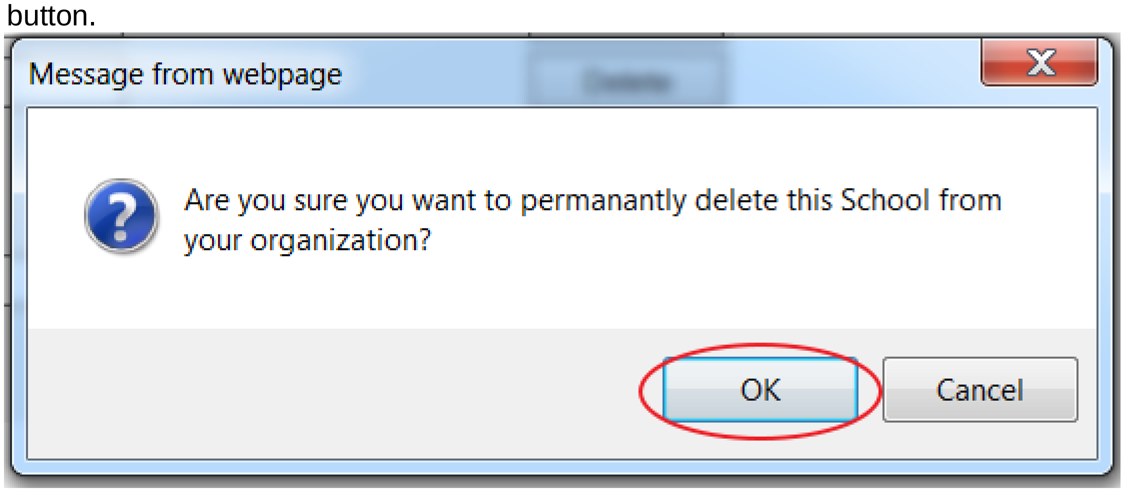
2. On the Manage Schools page, choose the school whose information you would like to delete from the School Name drop down list at the top of the screen.



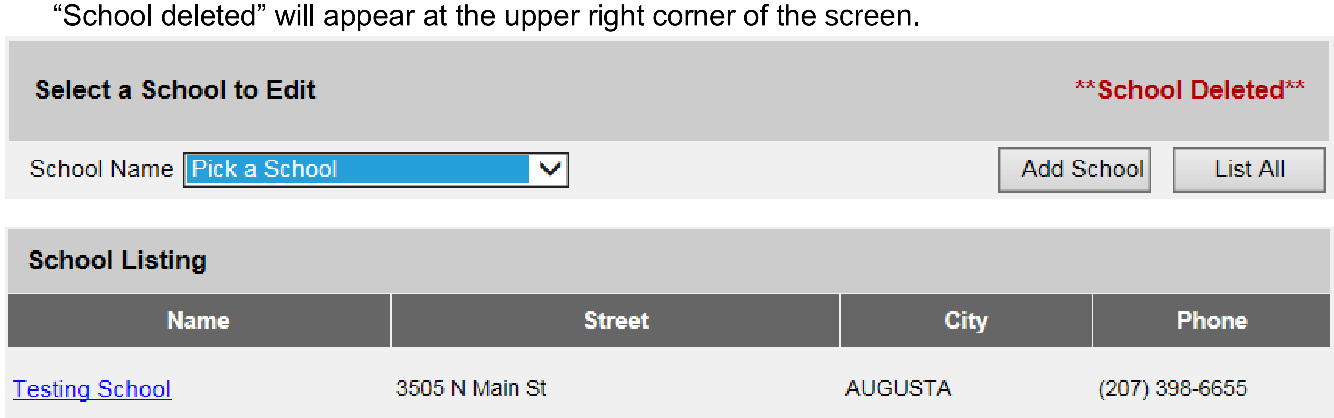
3. In the Edit School box, click the **Delete** button.



4. A box will open asking if you want to delete this school. Click the **OK** button.

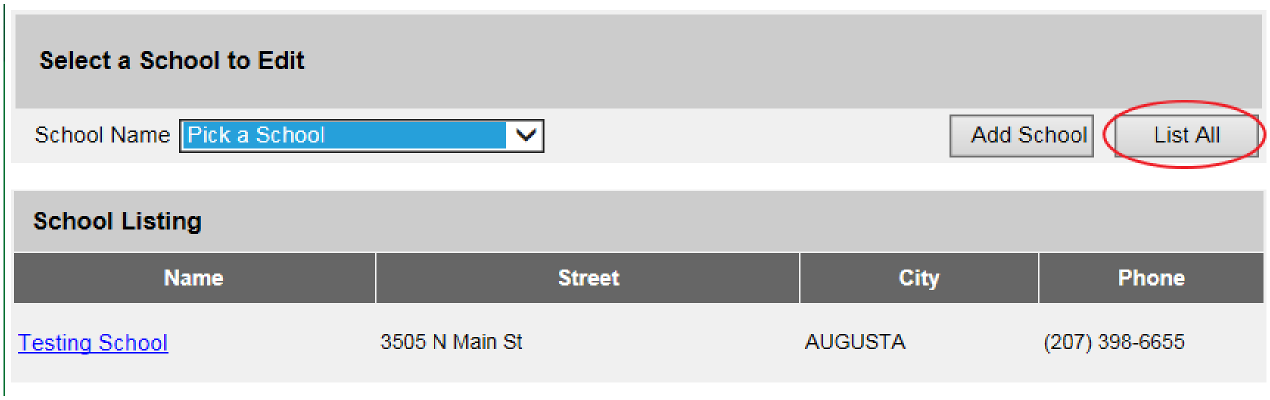


5. ImmPact will return to the Manage Schools screen and the message "School deleted" will appear at the upper right corner of the screen.



Listing All Schools

A list of all schools entered into an organization's database may be viewed by clicking the List All button on the Manage Schools page.

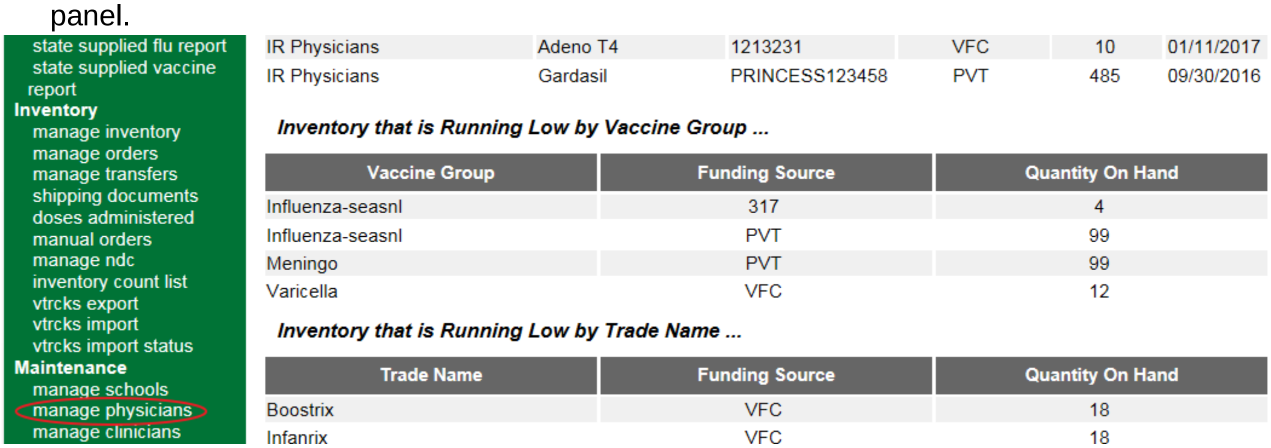


MANAGING PHYSICIANS

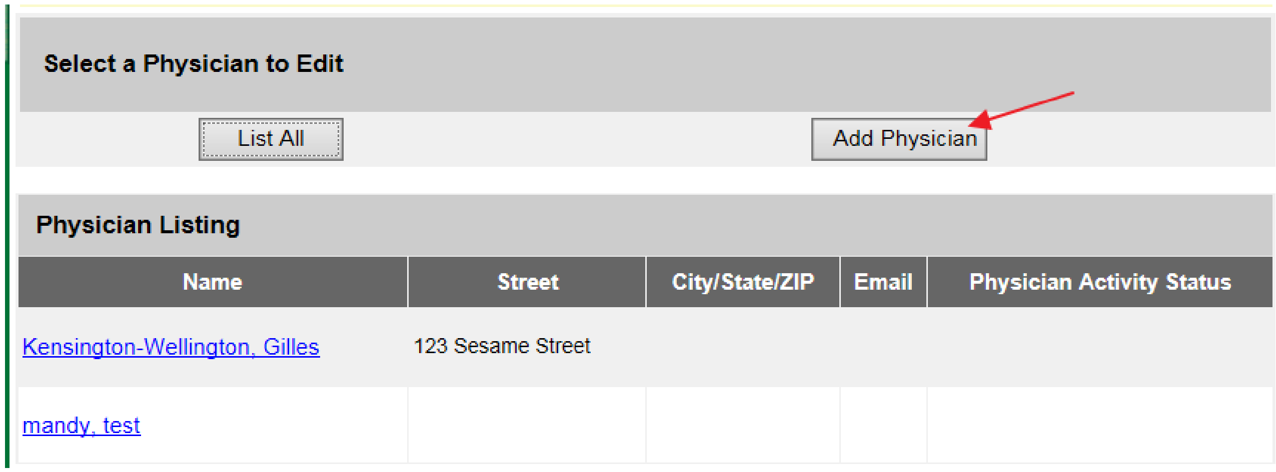
Physicians are considered Primary Care Providers (PCPs) in ImmPact. Users can utilize the Add Physician/Edit Physician pages to enter PCPs. Health care organizations or clinic names may also be entered in the Add Physician page. Physicians or health care organizations entered on this page will be available for selection from the Provider-PCP drop-down list on the Patient Demographic page. Reports may then be generated from data for specific providers. For example, reminder recall reports could be run for a specific PCP, rather than for an entire clinic.

Adding Physicians

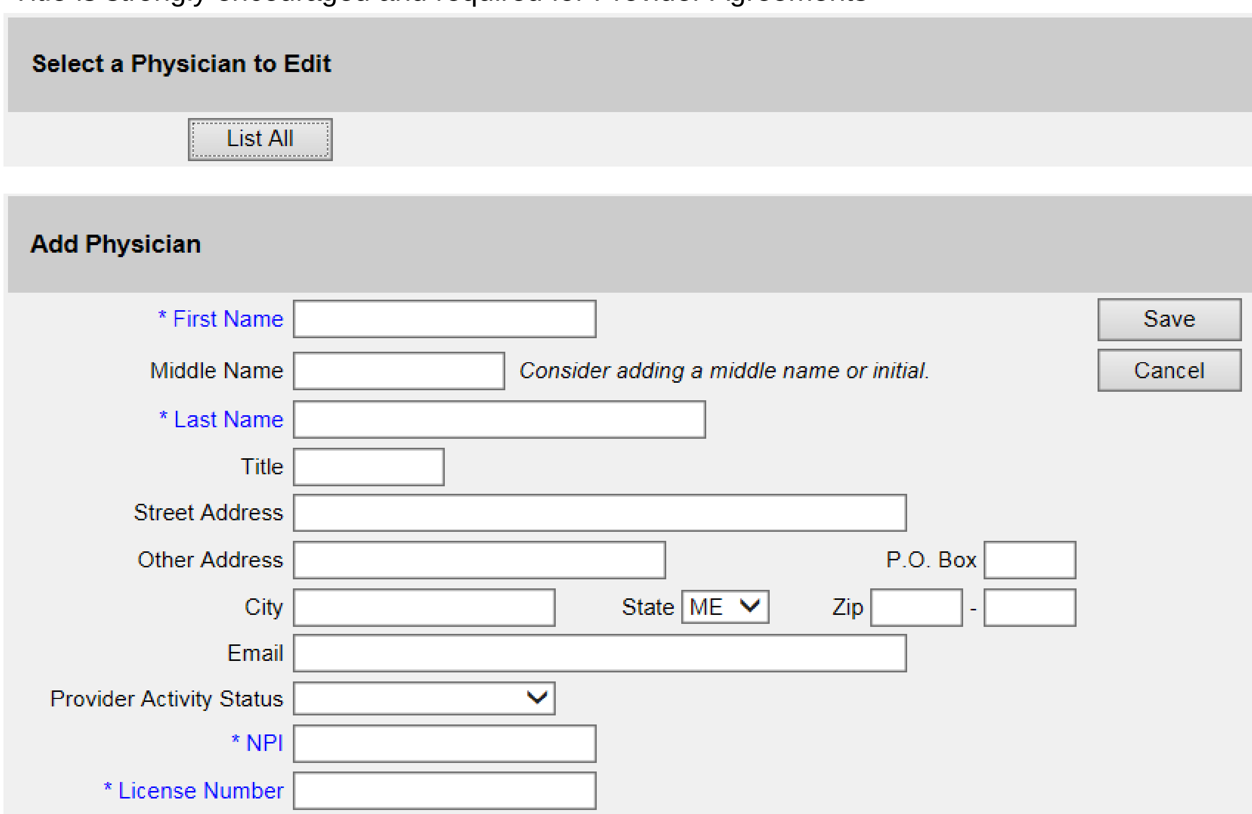
1. Click **Manage Physicians** under the Maintenance section of the menu panel.



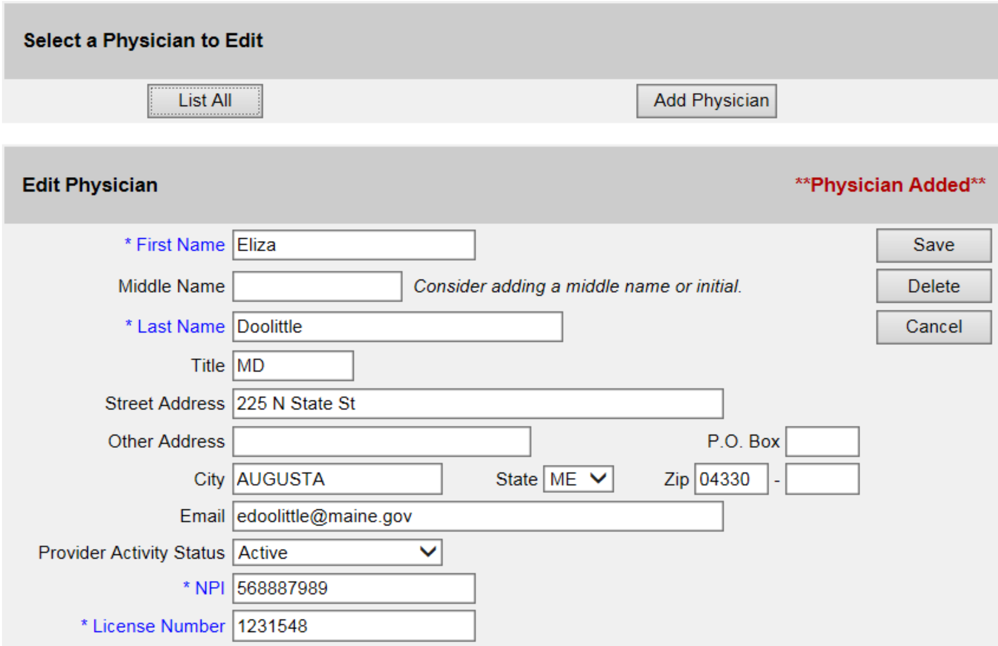
2. On the Manage Physicians page, click the **Add Physician** button.



3. In the Add Physician box, fill in the required fields: Last Name, First Name, NPI and License Number plus any additional information you wish to supply about the physician. To add a clinic name, type the site name in the Last Name field and the location in the First Name field. *Title is strongly encouraged and required for Provider Agreements



4. Click the **Save** button.
5. Once the physician is successfully saved, “Physician Added” displays in the upper right corner of the Edit Physician box.

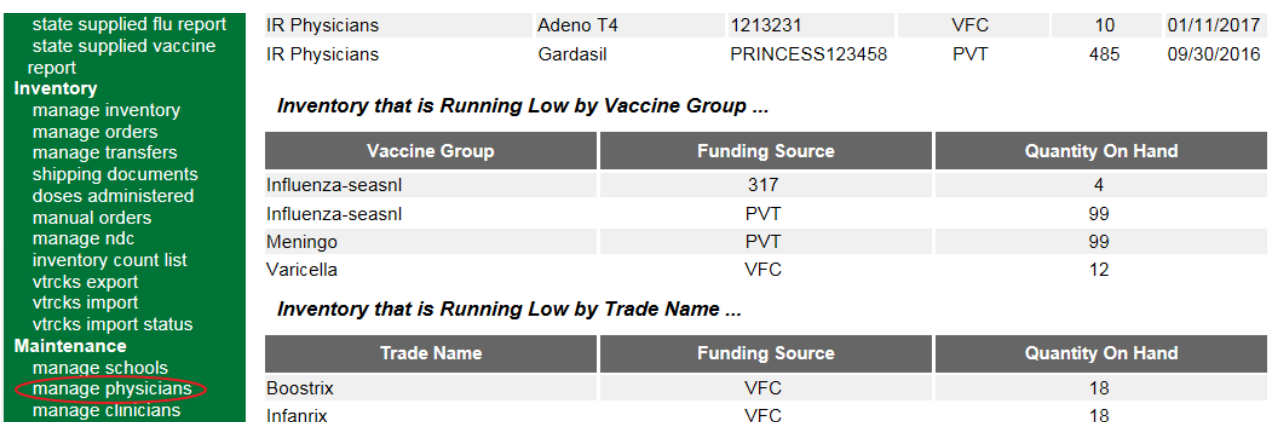


6. Click the **List All** button to return to the Manage Physicians page.

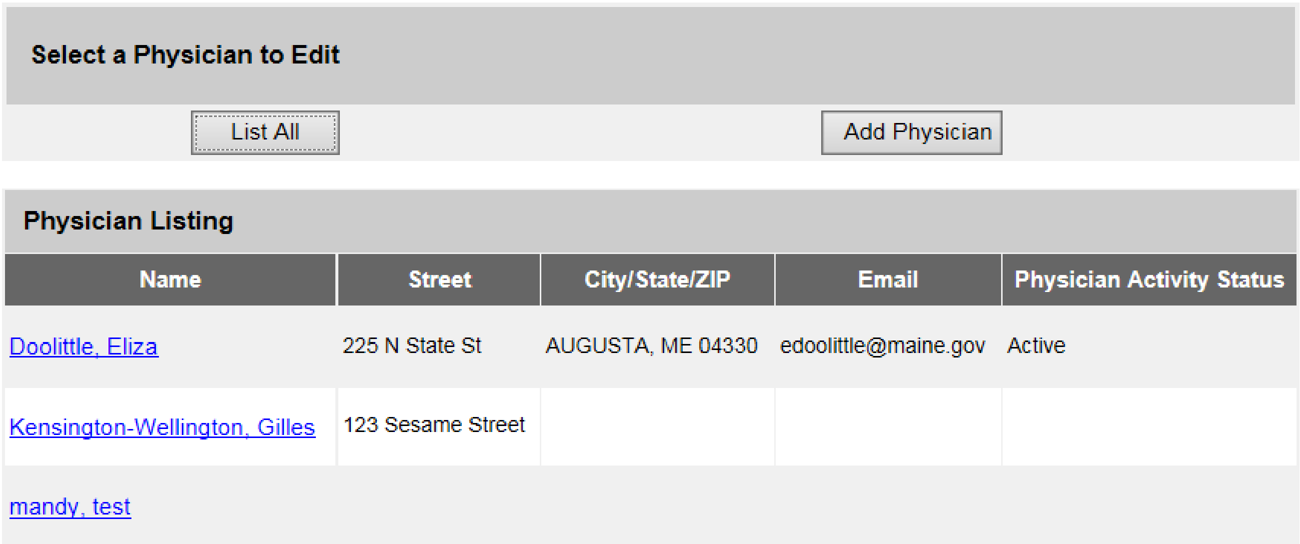
Note: When entering a physician on the Add Physician page, keep in mind that this is a primary care provider associated to the patient, not to a vaccination.
Provider-PCP may be used for filtering when running a Reminder/Recall report.

Editing Physician Information

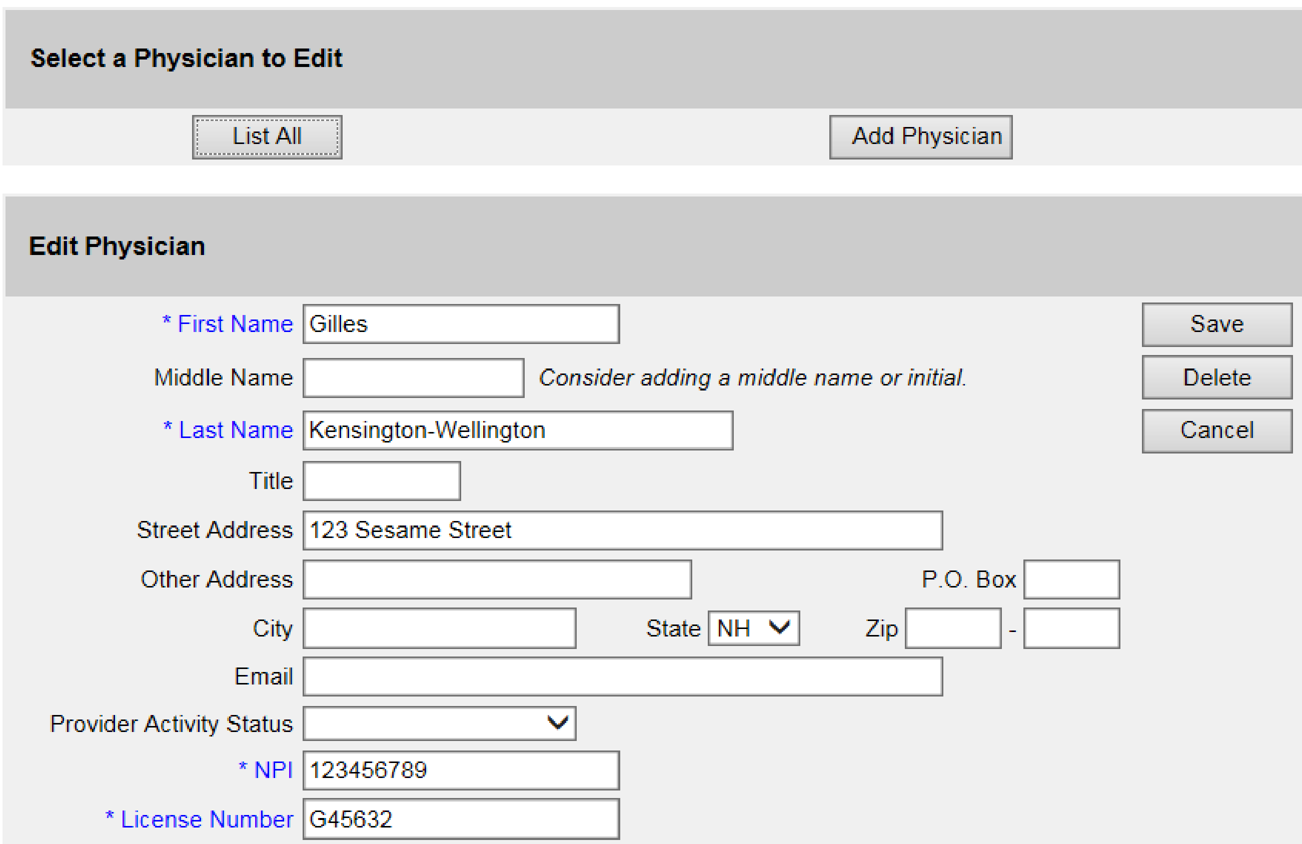
1. Click **Manage Physicians** under the Maintenance section of the menu panel.



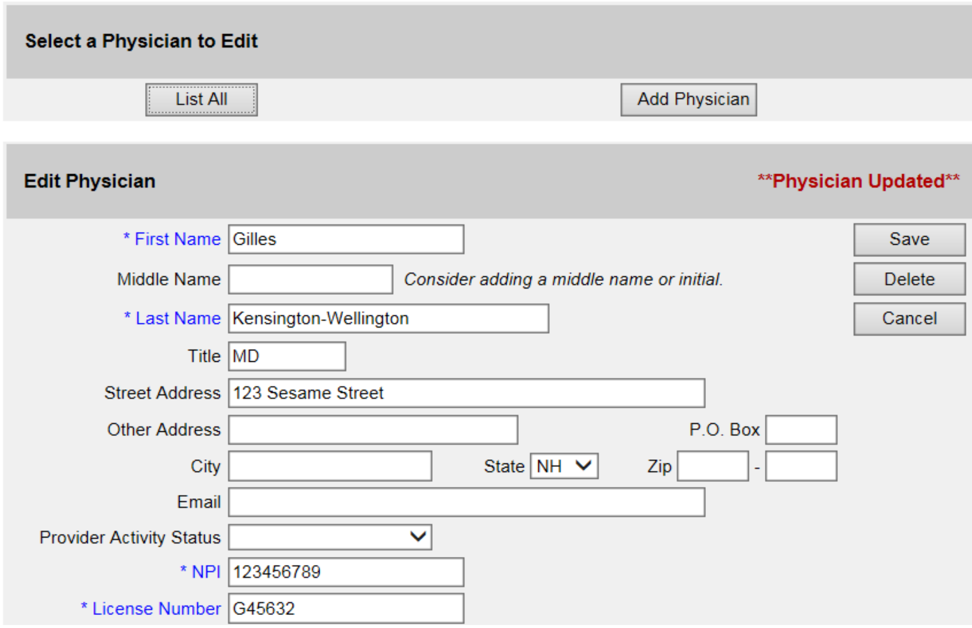
2. On the Manage Physicians page, click the Physician's name in the Physician Listing at the bottom of the page.



3. Add or change information in the Edit Physician box.



4. Click the **Save** button
5. Once your changes are successfully saved, “Physician Updated” will appear in the upper right corner of the Edit Physician box.

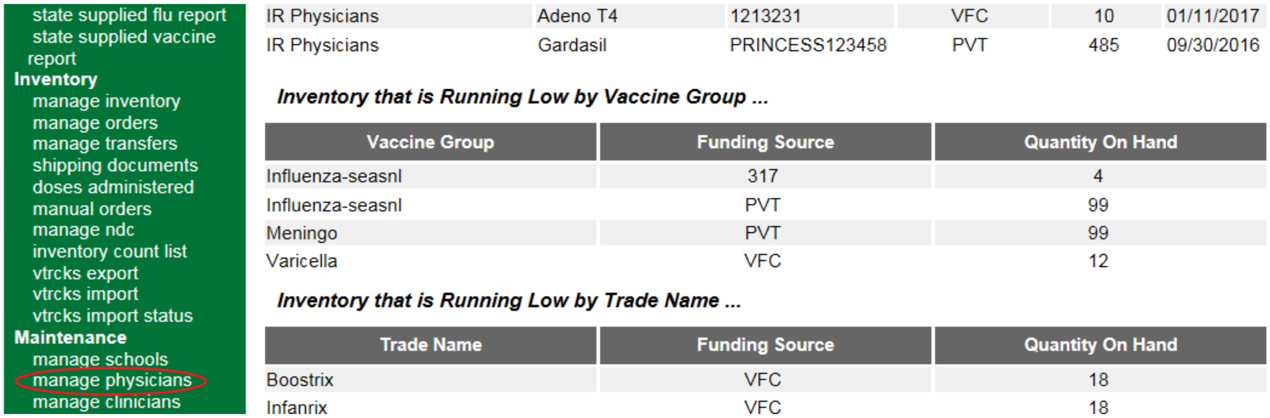


6. Click the **Cancel** button twice, or the List All button to return to the Manage Physicians screen.

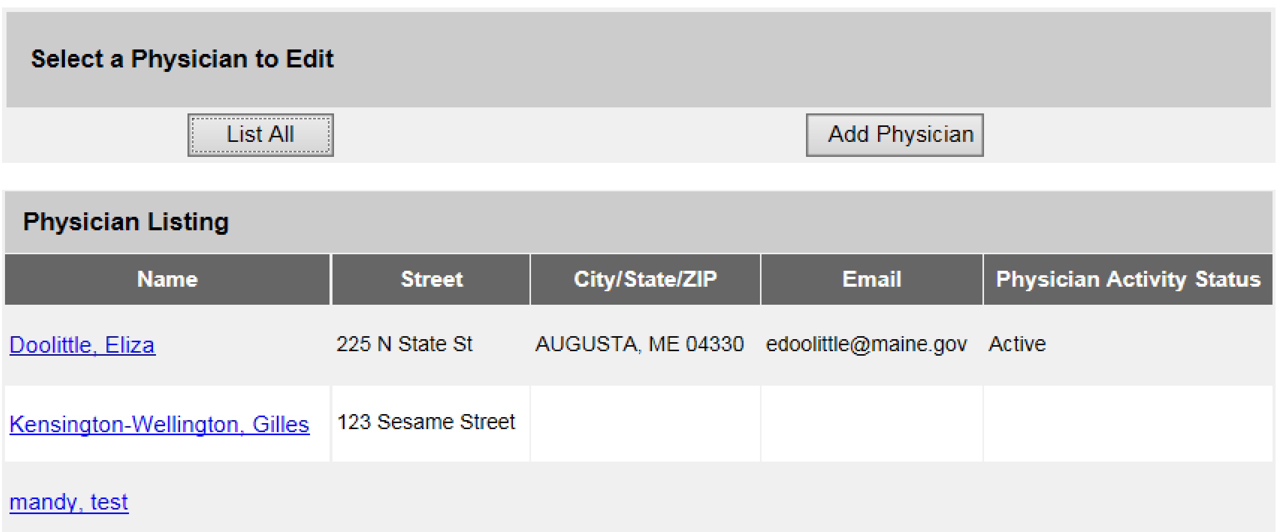
Note: Adding Physicians and Clinicians into your physicians' list does not create an ImmPact User Account for them. Please refer to Managing Users and Organizations (Chapter 6), for instructions on adding users into ImmPact.

Deleting Physicians

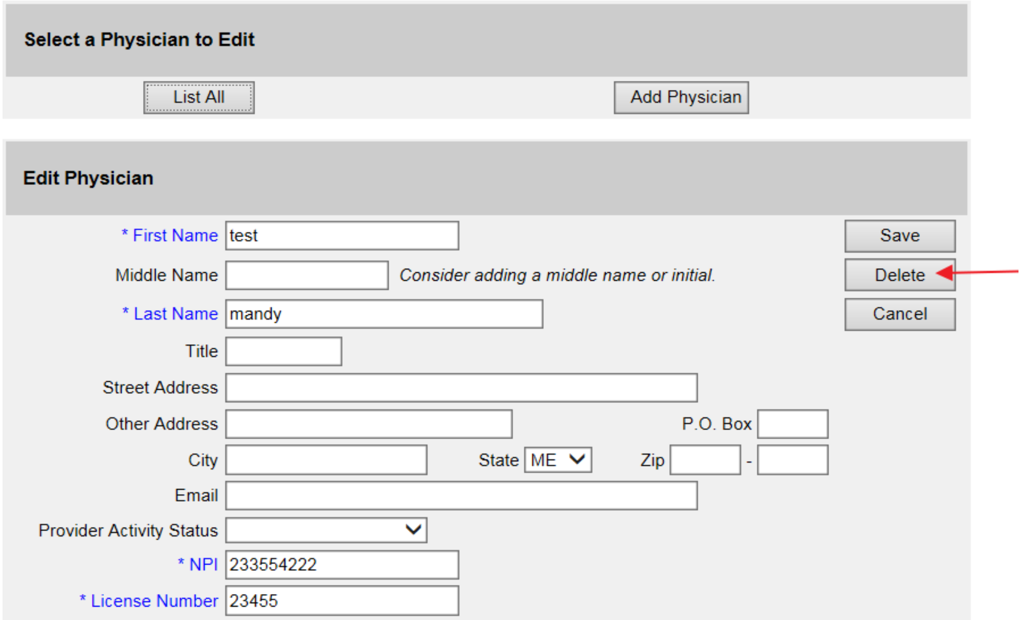
1. Click **Manage Physicians** under the Maintenance section of the menu panel.



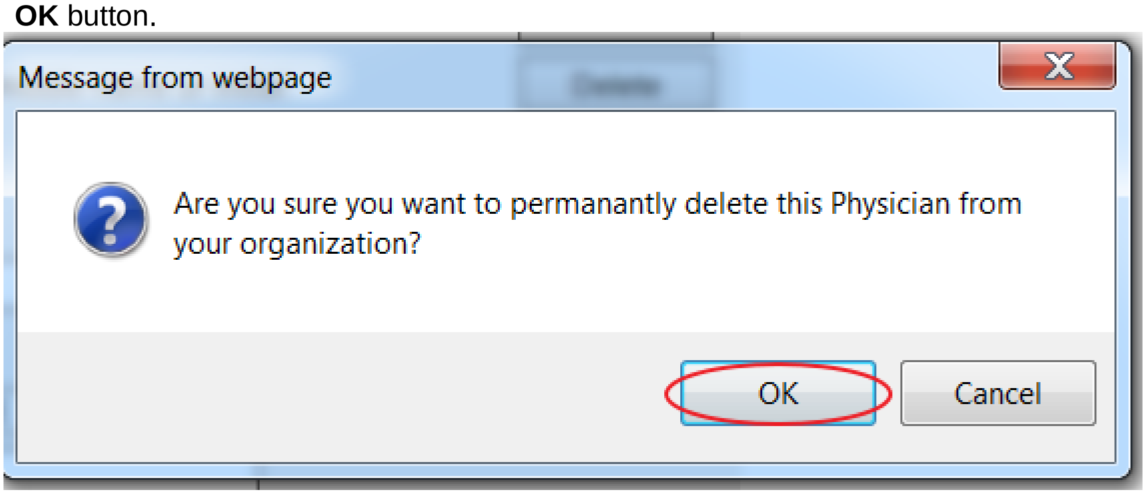
2. On the Manage Physicians page, choose the physician whose information you would like to delete from the Physician Name drop down list at the top of the screen or click on the physician's name in the Physician Listing at the bottom of the screen.



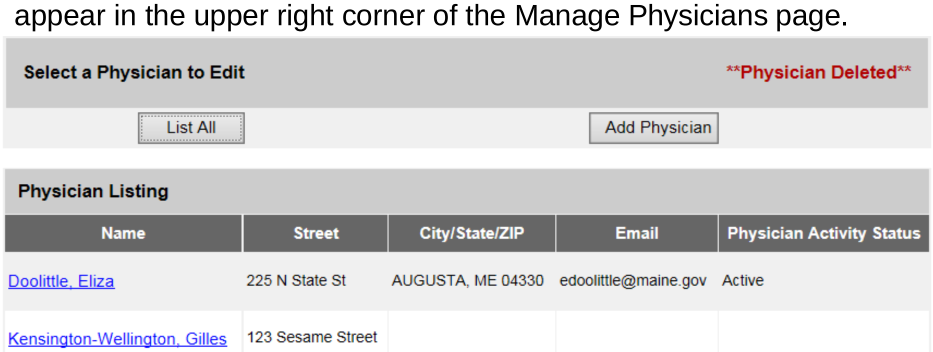
3. In the Edit Physician box, click the **Delete** button.



4. A box will open asking if you want to delete this physician. Click the **OK** button.



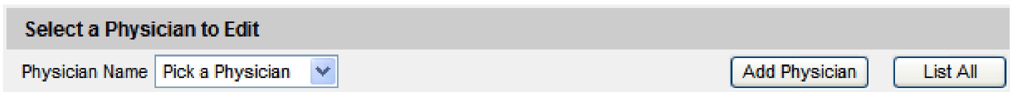
5. Once your changes are successfully saved, “Physician Deleted” will appear in the upper right corner of the Manage Physicians page.



Name	Street	City/State/ZIP	Email	Physician Activity Status
Doolittle, Eliza	225 N State St	AUGUSTA, ME 04330	edoolittle@maine.gov	Active
Kensington-Wellington, Gilles	123 Sesame Street			

Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by clicking the List All button on the Select a Physician to Edit page.

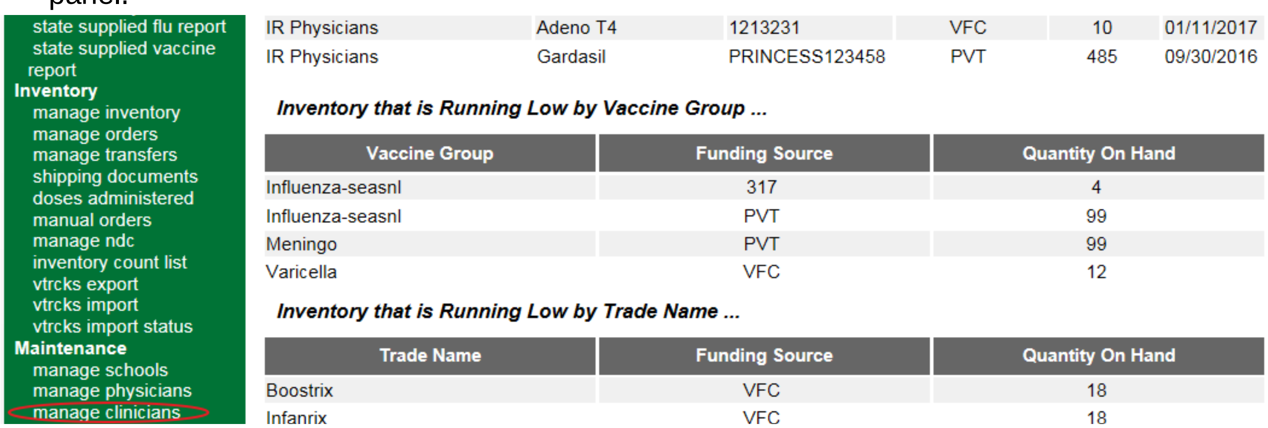


MANAGING CLINICIANS

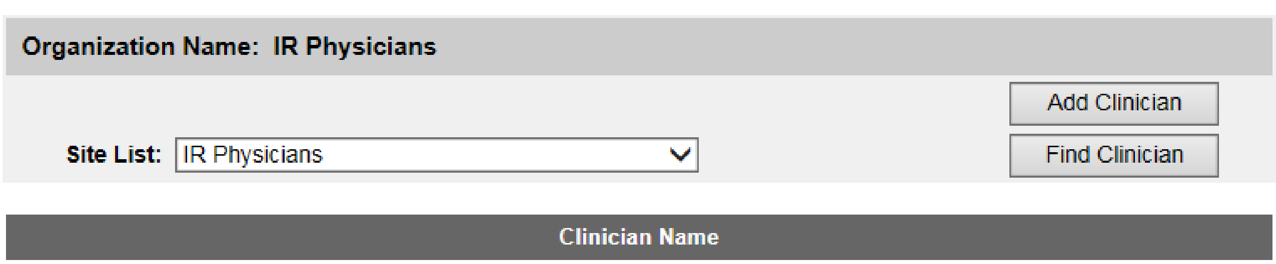
Clinicians are the individuals within the organization who administer vaccines to patients. A clinician may be associated with one or more clinic sites. ImmPact users will use the Manage Clinicians function to enter clinicians within the organization. Clinicians added to ImmPact through this function will be available from the Administered By drop down list used for recording immunizations.

Adding Clinicians

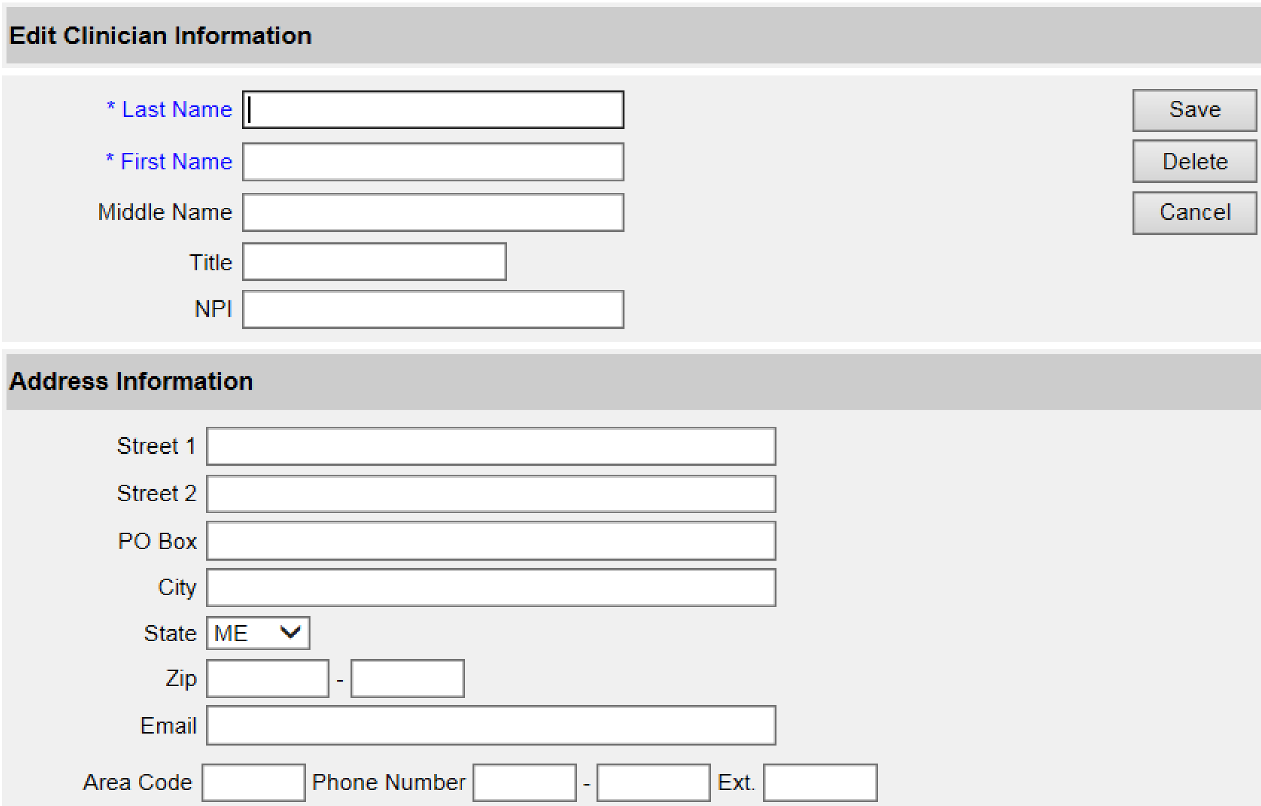
1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



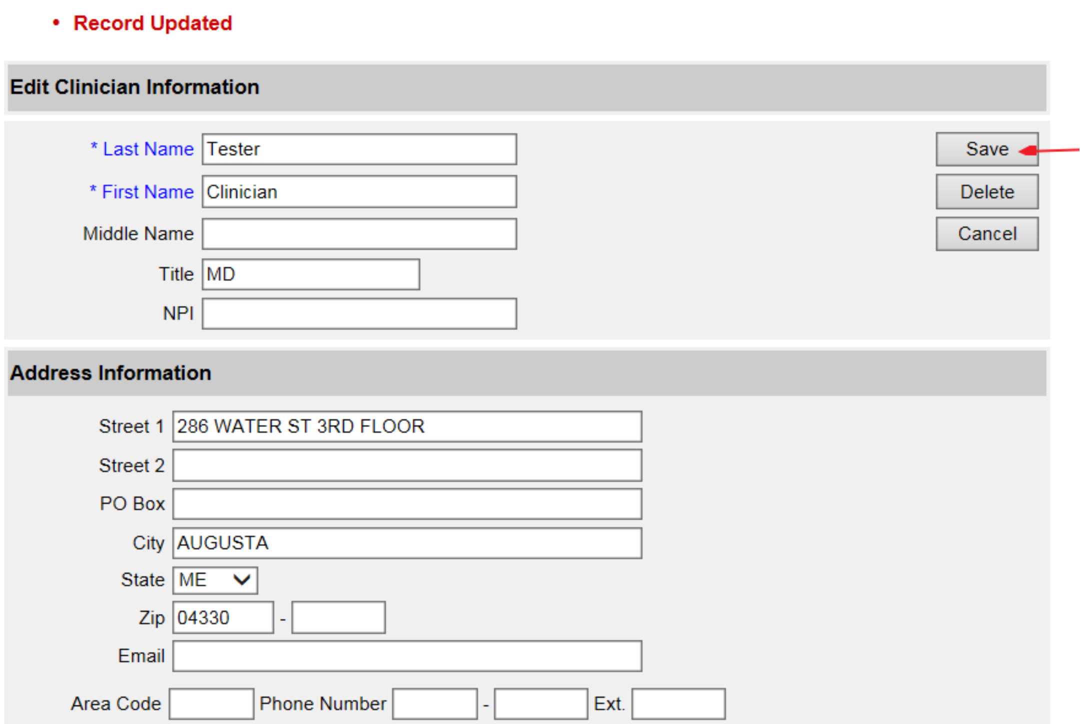
2. Click the **Add Clinicians** button.



3. At the Edit Clinician Information page, populate the required fields.



4. Fill in the Last Name and First Name fields and any other fields you wish to complete.
5. Click the **Save** button.

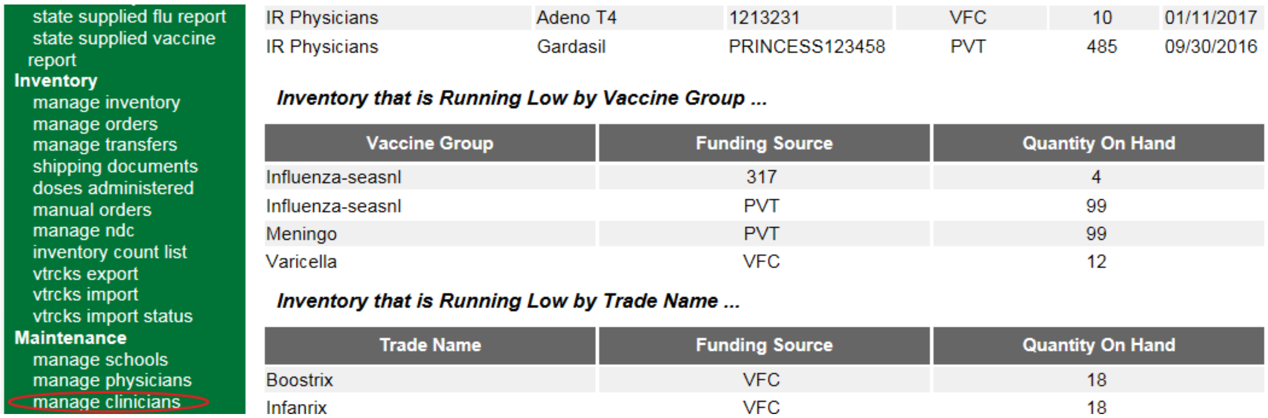


6. After the clinician is successfully saved the message, “Record Updated” will appear at the top of the screen.
7. Click the **Cancel** button to return to the Manage Clinicians page.

Note: Required fields are shown in blue text. Input fields not shown in blue are optional.

Editing Clinician Information

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



IR Physicians	Adeno T4	1213231	VFC	10	01/11/2017
IR Physicians	Gardasil	PRINCESS123458	PVT	485	09/30/2016

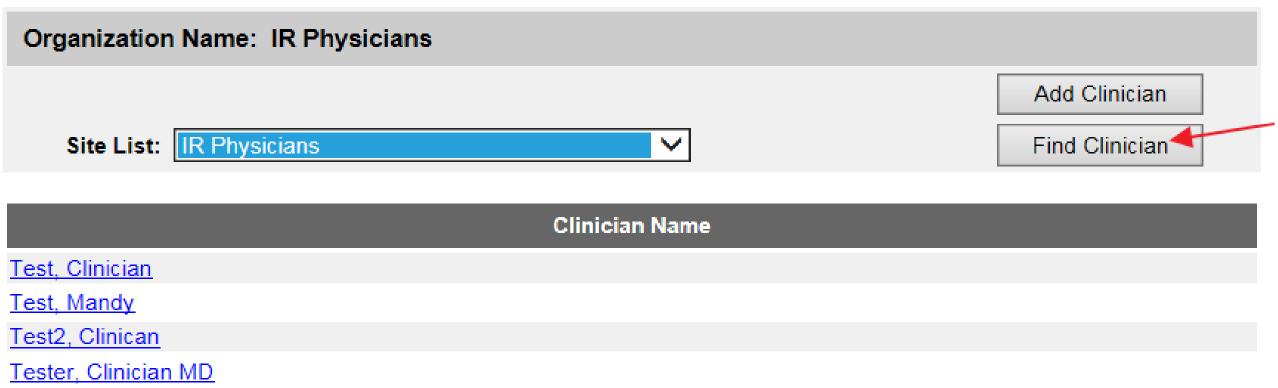
Inventory that is Running Low by Vaccine Group ...

Vaccine Group	Funding Source	Quantity On Hand
Influenza-seasnl	317	4
Influenza-seasnl	PVT	99
Meningo	PVT	99
Varicella	VFC	12

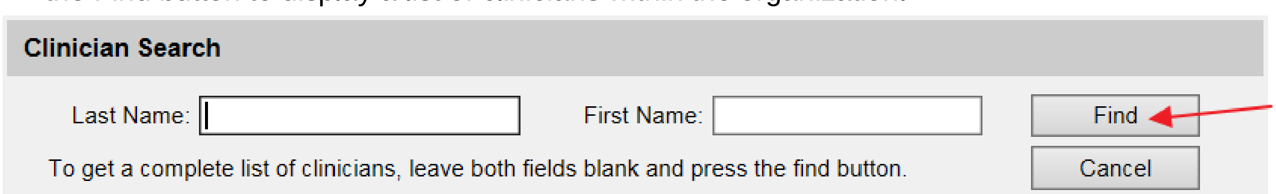
Inventory that is Running Low by Trade Name ...

Trade Name	Funding Source	Quantity On Hand
Boostrix	VFC	18
Infanrix	VFC	18

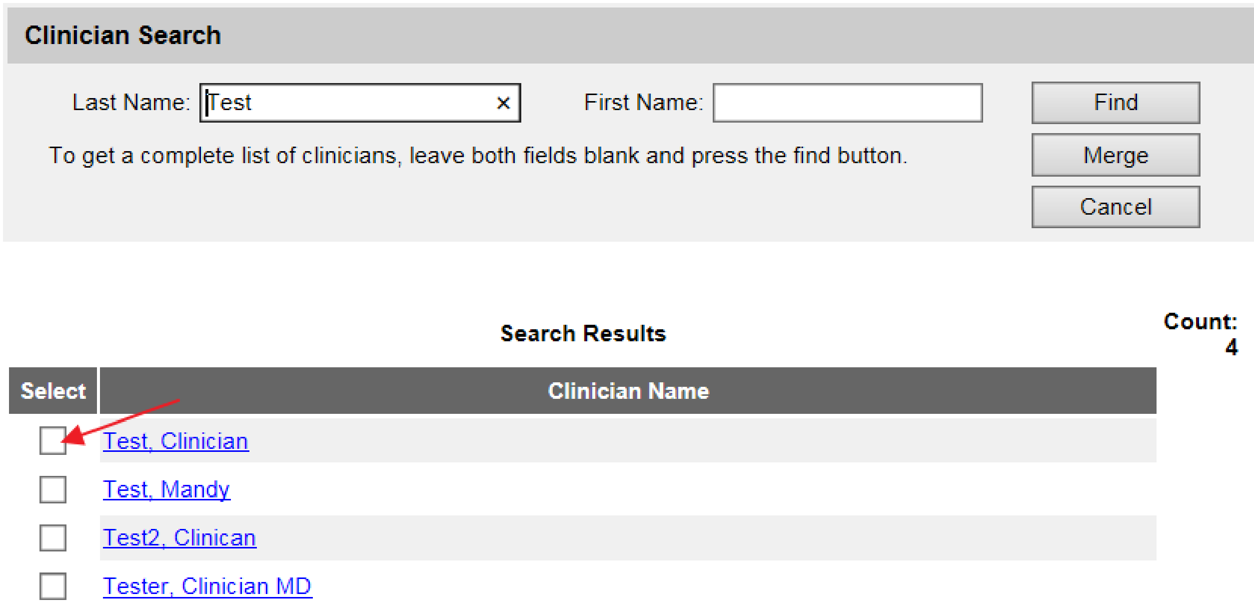
2. Click the **Find Clinician** button or click on the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.



3. At the Clinician Search page, enter the last and/or first names of the clinician and click the Find button. Then, click the last name in the Search Results table. You can also leave both fields blank and click the Find button to display a list of clinicians within the organization.



4. Click the last name of the clinician within the Search Results table to bring up his or her information.



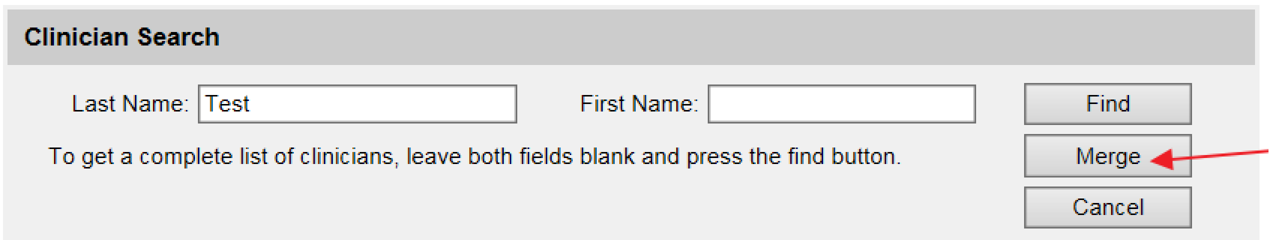
5. Make the desired changes to the clinician's information.
6. Click the **Save** button.
7. Once the clinician's information is successfully updated, the message "Record Updated" will display at the top of the page
8. To return to the Manage Clinicians page, click the **Cancel** button.

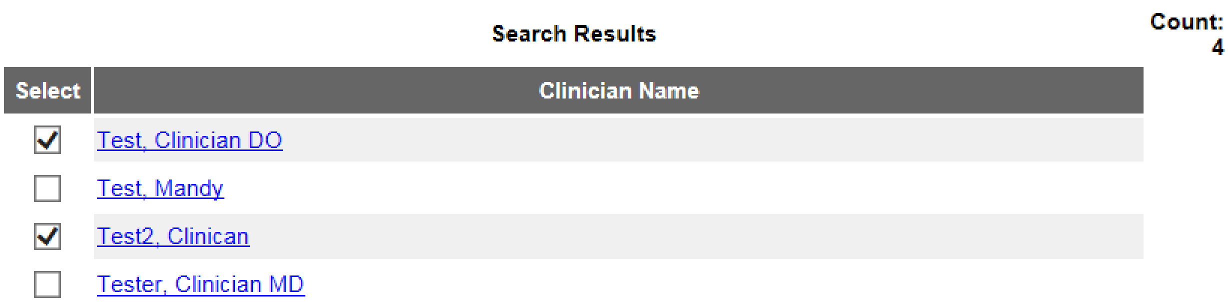
Merging Clinicians

Occasionally clinicians are entered more than once creating duplicate records. To eliminate extraneous records using ImmPact merge clinician feature, follow these steps:

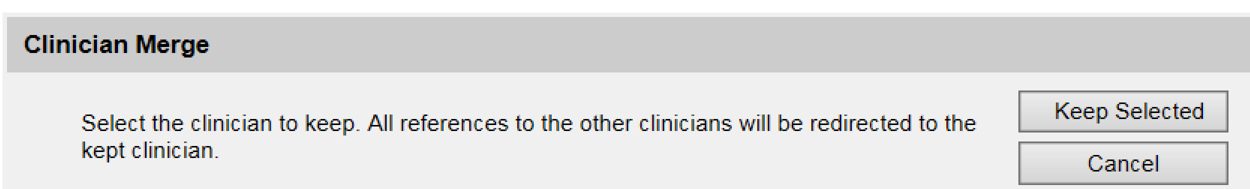
1. Click **Manage Clinicians** under Maintenance section of the menu panel.

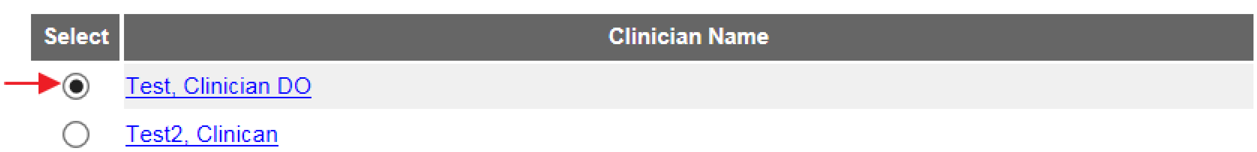
2. Click the **Find Clinician** button.
3. Enter the last and/or first names of the clinician. Click the **Find** button.
4. Select at least two clinicians from the search results table and click the **Merge** button.





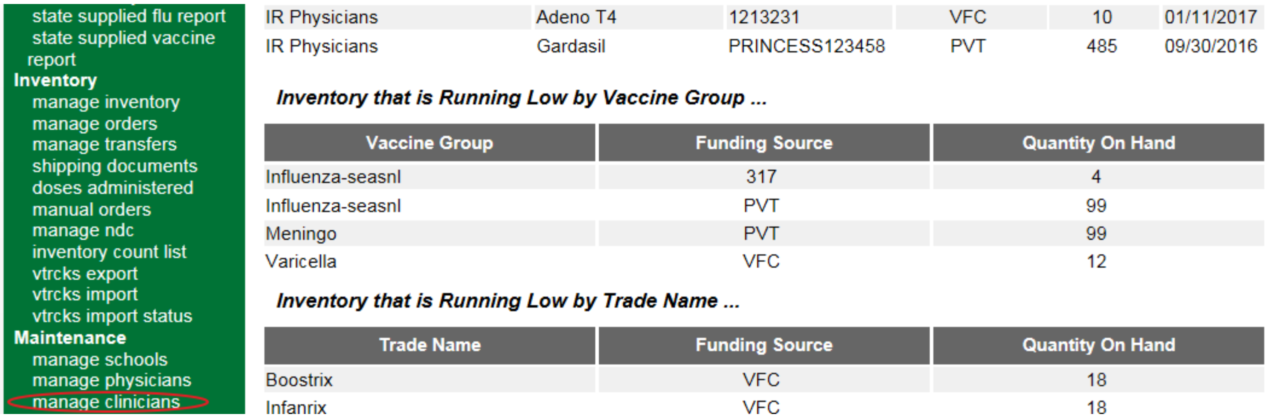
5. Select the Clinician you wish to keep and click the **Keep Selected** button.



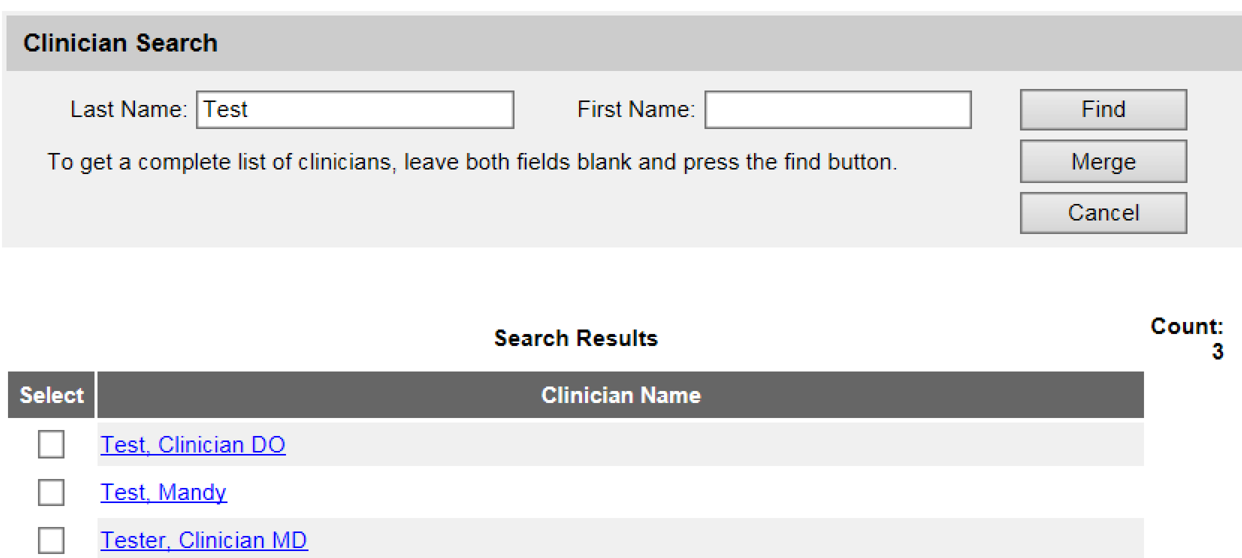


Deleting Clinicians

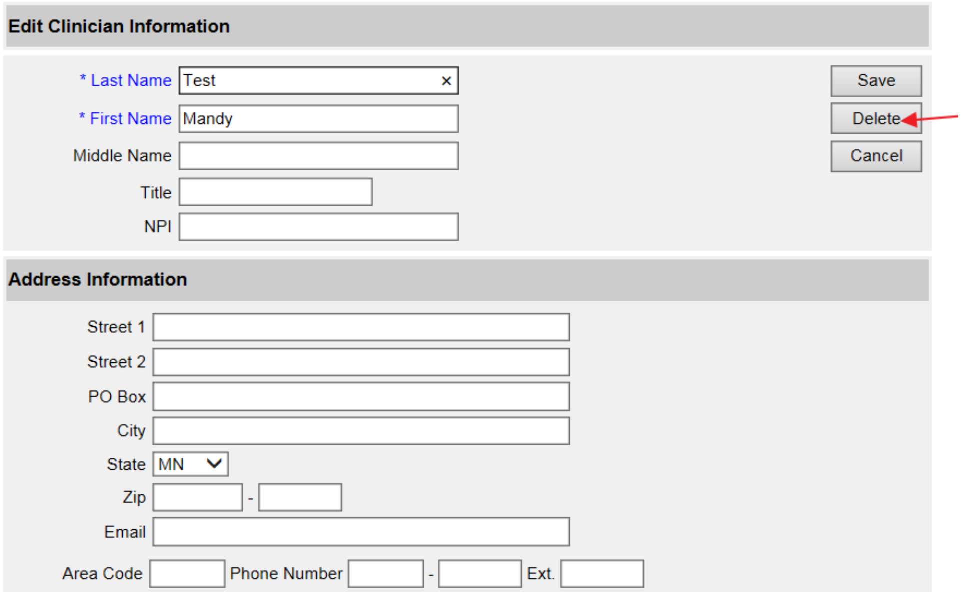
1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



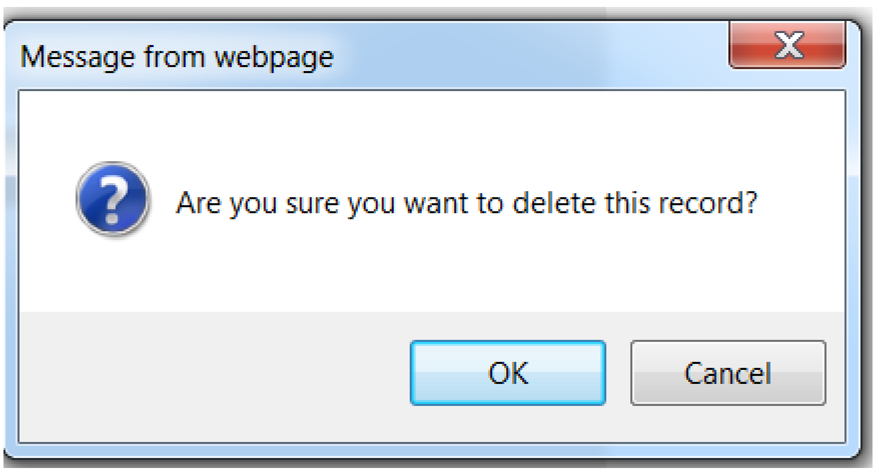
2. On the Manage Clinicians page click the **Find Clinicians** button or click the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose the latter option, skip to step 4.
3. At the Clinician Search screen, enter the first and/or last name of the clinician and click the **Find** button.
4. Then click the last name in the Search Results table or leave both fields blank and click the **Find** button to bring up a list of clinicians within the organization. You may then click on the last name of the clinician within the Search Results table to bring up his or her information.



5. At the Edit Clinician Information page, click the **Delete** button



6. A box will open asking if you want to delete this clinician. Click the **OK** button.



7. ImmPact will return you to the Manage Clinicians page.

CHAPTER 9: MANAGING INVENTORY

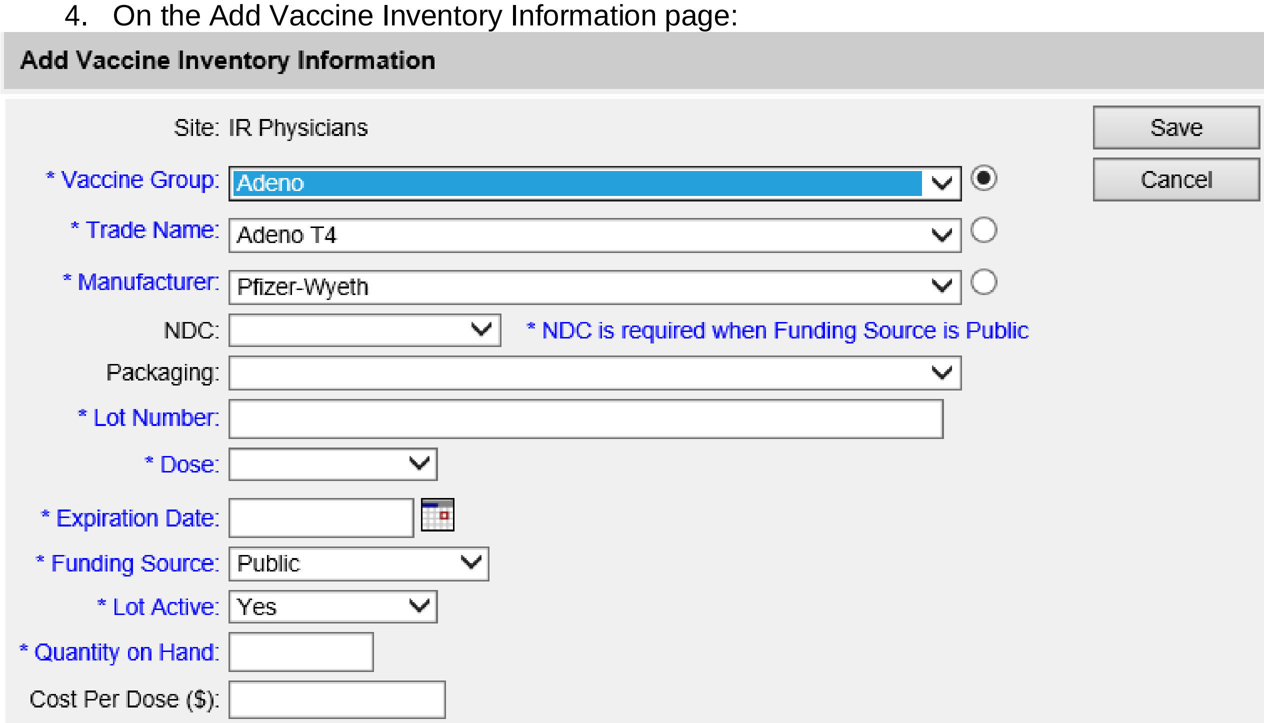
In this chapter:

The Inventory Module in ImmPact is designed to be a complete tracking system for an organization's vaccine inventory. Users of ImmPact have the ability to set up the inventory module for their organization and can view, add or update any vaccine in an organization's inventory. Inventory will automatically decrement doses entered through the web—based User Interface, assuming that "From Inventory" is checked on the "Add Immunizations" page. Functionality to decrement inventory from data reported through electronic data exchange is also available, if sending organization indicates that the doses administered came from inventory and the data matches an existing inventory lot in ImmPact.

Adding New Inventory

Use the Add Vaccine function only if you are setting up your inventory for the first time, or if you are adding a vaccine with a *new* lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to the *Updating Inventory* section in this chapter.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. On the Inventory Alerts page, click the **Show Inventory** button.
3. Click the **Add Inventory** button.
4. On the Add Vaccine Inventory Information page:



   a. Choose the Vaccine Group from the drop-down list. Once you have selected the Vaccine Group, the Trade Name list will display with Trade Names only for the Vaccine Group selected. Note that the three radio buttons on the right allow the user to filter by either group, trade name, or manufacturer.

b. Choose the vaccine’s Trade Name from the drop-down list provided. Once you have selected a Trade Name the Manufacturer field will be populated.

c. Choose the National Drug Code (NDC) from the drop-down list that matches what you received. **NDC is required when Funding Source is Public.**

d. Once you have selected the NDC, the Packaging drop down list will populate. Choose the packaging type that matches what you received.

e. Enter the lot number of the vaccine in the Lot Number field.

f. Choose the dose from the Dose Size drop down list; choose .2, .25, .5, .65, 1, or 2 ml.

g. Enter the vaccine lot’s expiration date. Fill in the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the **OK** button. If no day is specified on the vaccine, enter the last day of the month.

h. Select the appropriate funding source (Only ‘Private’ is available if vaccine coordinator or standard user). Only state users can add public lots.

i. Choose **Yes** from the Lot Active drop-down list. When adding new inventory, the lot may only be entered as active. This controls whether the lot appears on the drop-down list on the Add Immunization page.

j. Enter the number of vaccine doses received in the Quantity on Hand field.

k. Cost Per Dose is optional for clinic use: how much clinic pays per vaccine, patient fee, or clinic administration charge.

5. Click the **Save** button.
6. If the new vaccine was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the page.
7. To add additional vaccines, click the **Add New** button and repeat Steps 4-5.
8. To return to the Show Inventory page, click the **Cancel** button.

VIEWING INVENTORY

To view your organization’s vaccine inventory in ImmPact, follow these steps:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.

Manage Inventory

Add Inventory	Add Inventory
Modify Quantity On Hand....	Modify Quantity
Show Transactions....	Show Transactions
Show Previous Counts....	Inventory Count Listing
Print Inventory Shown Below....	Print
Return to the Previous Screen....	Cancel

Funding Source: ALL **Show** ◉ Active ○ Inactive ○ Non-Expired ○ Expired

Select	Trade Name	Public	Lot Number	Packaging	NDC	Inv On Hand	Active	Exp Date
☐	AstraZeneca COVID-19 Vaccine	Y	AZ011521	CARTON, 10 MULTI-DOSE VIALS	00310-1222-15	48	Y	03/31/2022
☐	Fluzone Pres-Free	Y	998541	FLUZONE INJECTION, 0.5 ML X 10 SYRGL	49281-0010-25	1	Y	12/31/2021
☐	Fluzone Quad	Y	112987		11845-0122-21	1	Y	12/31/2021
☐	Janssen COVID-19 Vaccine	Y	HG7475	CARTON, 10 MULTI-DOSE VIALS	59676-0580-15	40	Y	12/31/2069
☐	Moderna COVID-19 Vaccine	Y	896548	10 Dose Vial	80777-0273-99	80	Y	12/31/2022
☐	Moderna COVID-19 Vaccine	Y	C5455AA	10 Dose Vial	80777-0273-99	25	Y	12/31/2022
☐	Pfizer COVID-19 Vaccine	Y	134857	CARTON, MULTI-DOSE VIALS	59267-1000-03	40	Y	03/31/2022
☐	Pfizer COVID-19 Vaccine	Y	AL54871	CARTON, MULTI-DOSE VIALS	59267-1000-03	195	Y	12/31/2022

Last reconciliation Date: 05/20/2021 03:20:48 **Submitted By:** Lacey Dean

Submit Reconciled Inventory Count

By clicking this button to submit my inventory count I confirm that my inventory has been reconciled and the quantities shown here represent a complete and accurate count of my inventory on hand as of today's date.

3. The inventory table shown by default will include all available Funding Sources associated with your organization. You can view funding sources individually by selecting either from the dropdown menu.
4. Select one of the following options:
    a. **Active**: to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module (default)
    b. **Inactive**: to view only those vaccine lots that have been set to inactive by a user or automatically inactivated due to no doses remaining
    c. **Non-Expired**: to view any active or inactive inventory that has not yet expired
    d. **Expired**: to view any inventory that has expired

Note: The red text in the View Inventory page indicates that a vaccine is inactive. A vaccine may be inactive for several reasons such as the inventory for that vaccine's lot number may have been decremented to zero, the vaccine may have expired, or it may have been recalled and set to inactive by a user.

Vaccines on the View Inventory page that are highlighted in pink will expire within 30 days.

The following is an explanation of the columns in the inventory screen:

a. **Select**: A mark in this checkbox allows you to modify the quantity of the selected vaccine.
b. **Trade Name**: This lists the vaccine's trade name.
c. **Funding Source**: This displays the funding source for the vaccine.
d. **Lot Number**: This lists the lot number of the vaccine.
e. **Packaging**: This refers to the type and quantity of doses in each package. Ex: 1x10 VIALS means a 10-pack of single-dose vials.
f. **NDC**: This displays the National Drug Code (NDC) for the vaccine.
g. **Inv On Hand**: This lists the number of doses remaining in the organization's inventory.
h. **Active**: A "Y" indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (not available for use). Inactive vaccines are shown in red text.
i. **Exp Date**: This lists the vaccine's expiration date. Vaccines that will expire in 30 days or less are highlighted in pink.

UPDATING INVENTORY

There are two ways to change information for existing vaccines.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. The inventory table will display active vaccines by default.
4. Click the vaccine's trade name (which is a hyperlink) associated with the lot number you want to update. Only private lots can be modified by non-state users.
5. On the next page, make desired changes to any of the fields.
6. Click the **Save** button. Changes made to vaccine inventory after doses have been administered will be updated in patients' records who have previously received a dose from that vaccine lot.

Alternatively:

To only modify the quantity of doses on hand, select the checkbox under the Select column for the appropriate lot.

1. Click the **Modify Quantity** button located in the upper right-hand corner of the page.
2. Select the vaccine(s) that need to be modified.
3. Choose whether you would like to Add or Subtract from the inventory on hand from the Action drop down list.
4. Enter the quantity of inventory to be added or subtracted in the Amount field.
5. Choose an option from the Reason drop down list.
6. Add Reason Notes. This is a free text field for the user to add more context for the modification.
7. Click the **Save** button.
8. Once your updates are saved in ImmPact, the message "Inventory was updated successfully" will appear at the bottom of the page.
9. Click the **Cancel** button to return to the Show Inventory/Manage Inventory page.

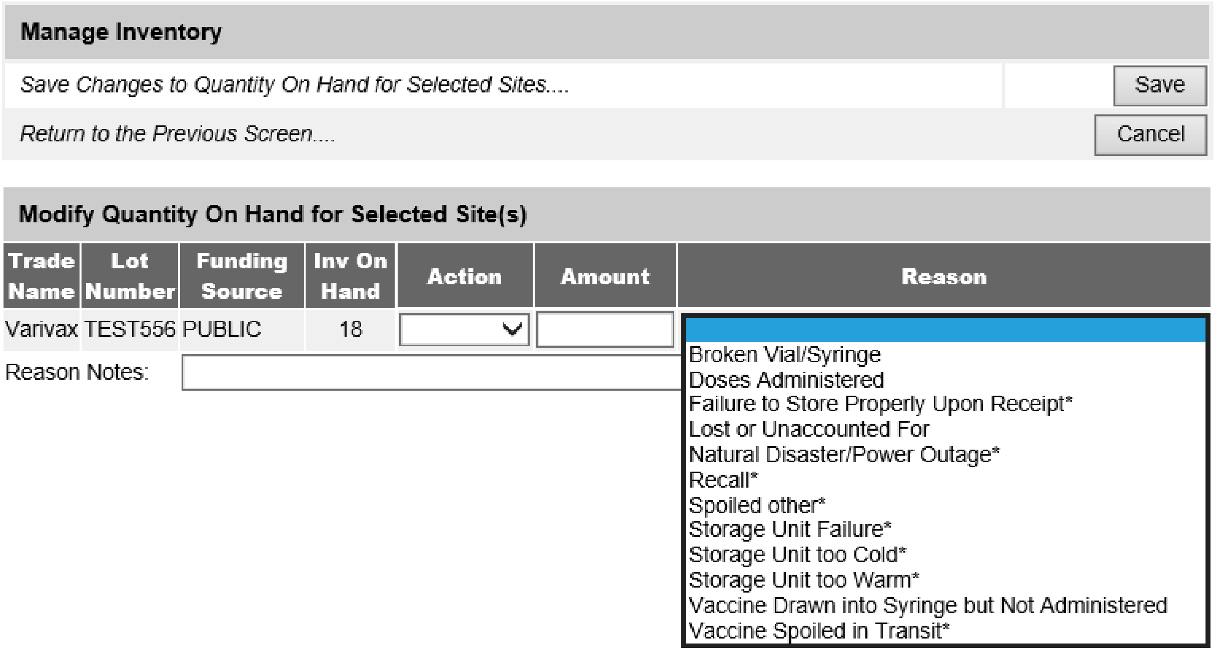


Table 1: Reasons for adding or subtracting inventory

Broken Vial / Syringe	Subtracting inventory that has been spilled or broken
Data Entry Error	Error in entering inventory
Doses Administered	Subtracting inventory due to giving dose(s) to a patient that were not deducted from inventory
Failure to Store Properly Upon Receipt*	Subtracting inventory due to improper storage
Lost or Unaccounted For	Subtracting inventory due to lost inventory or inventory that cannot otherwise be accounted for.
Natural Disaster / Power Outage*	Subtracting inventory due to a natural disaster or power outage
Recall*	Subtracting inventory that has been recalled
Spoiled- other*	Subtracting inventory due to spoilage
Storage Unit Failure*	Subtracting inventory due to improper refrigeration
Storage Unit too Cold*	Subtracting inventory due to refrigeration temperature
Storage Unit too Warm*	Subtracting inventory due to refrigeration temperature
Vaccine Drawn into Syringe but Not Administered	Subtracting inventory due to un-administered vaccine
Vaccine Misused	Wrong vaccine lot administered to incorrect eligibility *Note: Available to state users only*
Vaccine Replacement	Replacing vaccine that was administered incorrectly *Note: Available to state users only*

Vaccine Spoiled in Transit*	Subtracting inventory due to spoilage on way to provider

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots:

1. Follow Steps 1-3 under the Updating Inventory section.
2. Check the box under the Select column next to the vaccine lots whose quantities you want to modify.
3. Click the **Modify Quantity** button.
    a. On the Modify Quantity on Hand for Selected Site(s) page, enter the following information: Under Action, choose whether you would like to add or subtract from the inventory on hand.
    b. Under Amount, enter the quantity of inventory to be added or subtracted.
    c. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the list above for a description of the reasons for adding or subtracting inventory.
4. Click the **Save** button.

INVENTORY ALERTS

Inventory alerts inform users of the status of their organization's vaccine inventory. These alerts are displayed on the user's ImmPact homepage. Alerts for vaccines that are going to expire and vaccines that are running low are initially generated by a system default setting. These alerts can be customized.

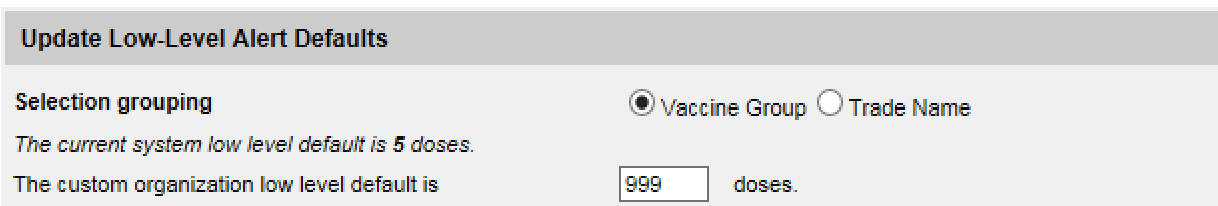
Inventory alerts can also be viewed on the Manage Inventory page. Select **Manage Inventory** located under the Inventory heading on the menu panel. Each table under Inventory alerts heading contains the following information:

- **Vaccine Order/Transfer Notification:** displays current orders/transfers along with their status.
- **Active Inventory that is Going to Expire or Expired Lots with a Quantity:** displays a list of vaccines that will expire within a set amount of days (30 days is the default) as well as vaccines that are expired but still have quantity in inventory.
- **Inventory that is running low by vaccine group**: displays inventory that is below a specific threshold of volume, organized by vaccine group (the default low-level alert is 5 doses).
- **Inventory that is running low by trade name**: displays inventory that is below a specific threshold of volume, organized by trade name (the default low-level alert is 5 doses).

Updating Inventory Alert Preferences

To update Inventory Alert Preferences for expiration and low inventory alerts:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Update ALERT Prefs** button.
3. On the Inventory Expiration Alerts page, the system default is 30 days. To customize this alert, enter the number of days you want to be notified prior to the expiration of any vaccine lot.
4. For all low-level alerts, the system default is 5 doses. Select the appropriate radio button for **Vaccine Group** or **Trade Name** in the **Update Low-Level ImmPact Defaults** section and enter the number of doses you prefer.



5. Click the **Save** button. If the new preferences were saved successfully, the message "Updated ImmPact Preferences" displays at the top of the page.

Note: To restore all inventory alerts to ImmPact system defaults, click the Restore Defaults button. Click the **OK** button. To return to the Manage Inventory page, click the **Cancel** button.

Printing Inventory

To print a list of inventory:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. Click anywhere on the page.
4. Print according to your system’s requirements, which could include:
    a. Click **File** and click **Print**.
    b. Click the Printer icon in the browser’s toolbar.
    c. Simultaneously press **CTRL+P** on the keyboard.
5. If your printout is cut off, try setting your printer to print in landscape.

VIEWING INVENTORY TRANSACTIONS

The Show Transactions page is used to display vaccine lot track records for all inventory quantity-changing events. To run an inventory transaction report:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Transactions** button.
3. Enter the “From” and “To” dates for when the immunizations were entered in or submitted to ImmPact.
4. Alternatively, enter the “From” and “To” dates for when the immunizations were administered to the patient(s).
5. Choose a specific user name or All User Names.
6. Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason drop down list on the Edit Vaccine Inventory Information page.
7. Select the inventory site whose transactions you wish to view or choose All Sites with Inventory. Choose a specific Trade Name/Lot Number/Funding Source or choose All Lot Numbers.
8. Enter the quantity of records you wish to view in the Display Last <#> Records field.
9. Click the **View** button. The Vaccine Transactions page displays:

Vaccine Transactions for Organization: IR Physicians - IRPH - 159822 **Record Count: 7**

Site Name	Trans Date	Vaccination Date	Lot \ Funding Source \ Trade Name	Type	Qty	Patient Id	Patient Name	DOB	Username
IR Physicians	02/22/2018	02/22/2018	2134854 \ PUB \ Infanrix	Immunize	-1	265592	POCKET, POLLY	01/01/2017	jschuetz
IR Physicians	02/22/2018		abc123 \ PVT \ Pediarix	REC	20				jschuetz
IR Physicians	02/22/2018		TEST556 \ PUB \ Varivax	8	-2				jschuetz
IR Physicians	02/22/2018	01/08/2018	TEST556 \ PUB \ Varivax	FIXTOOL	-1	265530	THOMPSON, AMBER	01/08/2017	jschuetz
IR Physicians	02/22/2018	02/21/2018	FLU87654 \ PUB \ AFLURIA	CLINEVENT	-1	263867	TESTY, TEST	01/01/2014	jschuetz
IR Physicians	03/13/2018	11/16/2017	TEST556 \ PUB \ Varivax	FIXTOOL	-1	265613	COBB, RANDALL	11/10/2016	ldean
IR Physicians	03/13/2018		123788 \ PUB \ Rotarix	REC	25				mpatti

Vaccine Transactions Totals			
Trans Code	Trans Description	Trans Count	Trans Value
CLINEVENT	Added through Clinic Event	1	-1
8	Broken Vial/Syringe	1	-2
ERR	Data Entry Error	0	0
Delete	Deleted from Client Record	0	0
FIXTOOL	Dose Decremented by Fix Tool	2	-2
HL7ENTRY	Dose Decremented by HL7 Message	0	0
ADMIN	Doses Administered	0	0
REC	Doses Received	2	45
4	Expiration reported by Provider	0	0
6	Failure to Store Properly Upon Receipt*	0	0
Immunize	Immunization Given	1	-1
11	Lost or Unaccounted For	0	0
RDISAST	Natural Disaster/Power Outage*	0	0
12	Other	0	0
RECALL	Recall*	0	0
3	Spoiled other*	0	0
7	Storage Unit Failure*	0	0
RCOLD	Storage Unit too Cold*	0	0
RWARM	Storage Unit too Warm*	0	0
SYSERROR	System Error	0	0
TRAEXP	Transfer of Expired Inventory	0	0
TRA	Transferred between Providers in a viable state	0	0
1	Vaccine Drawn into Syringe but Not Administered	0	0
MISUSED	Vaccine Misused	0	0
REPLACE	Vaccine Replacement	0	0
5	Vaccine Spoiled in Transit*	0	0
	Transaction Totals:	**7**	**39**

[redacted]

Table 3: Vaccine Transactions

The top chart on the Vaccine Transactions page gives the following information:

Site Name	Vaccines in the table are first sorted alphabetically by your site name.
Trans Date	Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.
Vaccination Date	The date the vaccine was administered to the patient
Lot/Funding Source/Trade Name	The Lot Number, Funding Source, and Trade Name of the vaccine are listed in this column.
Type	Refer to Table 2 in this chapter for an explanation of the transaction codes shown in this column.
Qty	The quantity added to or subtracted from inventory due to the listed transaction type.
Patient ID	ImmPact Patient ID involved in the transaction
Patient Name	The patient associated with the transaction, if applicable.
DOB	The date of birth of the patient, if applicable.
Username	Username of the user that completed the transaction

Table 4: Transaction Totals

The chart at the bottom of the Vaccine Transactions page gives a breakdown of transactions by type.

Trans Code	Abbreviated code that identifies the transaction type.
Trans Description	Full transaction type.
Trans Count	Number of times a particular transaction type was performed within the dates you specified.
Trans Value	Quantity of doses added or subtracted by transaction type.

Printing Inventory Transactions

To print a list of vaccine transactions:

1. Follow Steps 1 - 4 under Viewing Inventory Transactions.
2. Click anywhere on the page.
3. Print according to your system's requirements, which could include:
    a. Click **File** and click **Print**.
    b. Click the Printer icon in the browser's toolbar.
    c. Simultaneously press **CTRL+P** on the keyboard.

If your printout is cut off, try setting your printer to landscape.

[redacted]

VIEWING VACCINE ORDERS

The Manage Orders page displays vaccine orders, the user who placed the order, the date they were submitted, their Order ID, and their status. Orders are displayed as Current, Historical or Both. To view the Manage Orders page click Manage Orders under the Inventory section of the menu panel.

Current Orders

By selecting the **Current** radio button, you will be able to view all new and processed orders that have not been accepted or rejected.

These orders will show a status of one of the following:

- **Pending:** Order has been created and submitted; however, the Maine Immunization Program has not yet opened the order. You may still modify the order.
- **In Progress:** Order is being processed by the Maine Immunization Program; you may no longer modify the order through ImmPact. If you need to alter an order at this stage, call the ImmPact Help Desk at 1-800-906-8754.
- **Sent to Distributor:** Order has been fully processed by the Maine Immunization Program and will be forwarded on to the appropriate order fulfillment facility.
- **Shipped:** Order has been shipped. Once the status of the order lists Shipped, you can accept the order into your organization's inventory through the Manage Transfers screen.

Historical Orders

By selecting the **Historical** radio button, you will be able to view all complete orders from the last 30 days. You may also enter a date range to view other completed orders. Historical orders will show a status of one of the following:

- **Cancelled:** Order was cancelled by your organization before being processed by the Maine Immunization Program.
- **Denied:** Entire order was denied by Maine Immunization Program.
- **Accepted:** Partial or entire order was accepted by the receiving organization.
- **Rejected:** Partial or entire order was completely rejected by the receiving organization and then restocked, if applicable, by Maine Immunization Program.

INVENTORY COUNT

The CDC requires inventory counts for ordering organizations to be submitted with each VFC Vaccine Order. The CDC requires that the Inventory Counts must be entered within 14 days of the VFC vaccine order. The CDC requires Provider PIN, Inventory Date, NDC, Lot Number, Quantity, and Expiration Date.

Before submitting an order, an organization will need to submit an inventory count. To submit an inventory count:

1. Click Manage Inventory under the Inventory section of the menu panel.
2. Click the Show Inventory button.
3. Scroll to the bottom of the inventory listed and click on the Submit Reconciled Inventory Count button.

☐	Pfizer COVID-19 Vaccine	Y	134857	CARTON, MULTI-DOSE VIALS	59267-1000-03	40	Y	03/31/2022
☐	Pfizer COVID-19 Vaccine	Y	AL54871	CARTON, MULTI-DOSE VIALS	59267-1000-03	195	Y	12/31/2022

Last reconciliation Date: 05/20/2021 03:20:48 **Submitted By:** Lacey Dean

Submit Reconciled Inventory Count

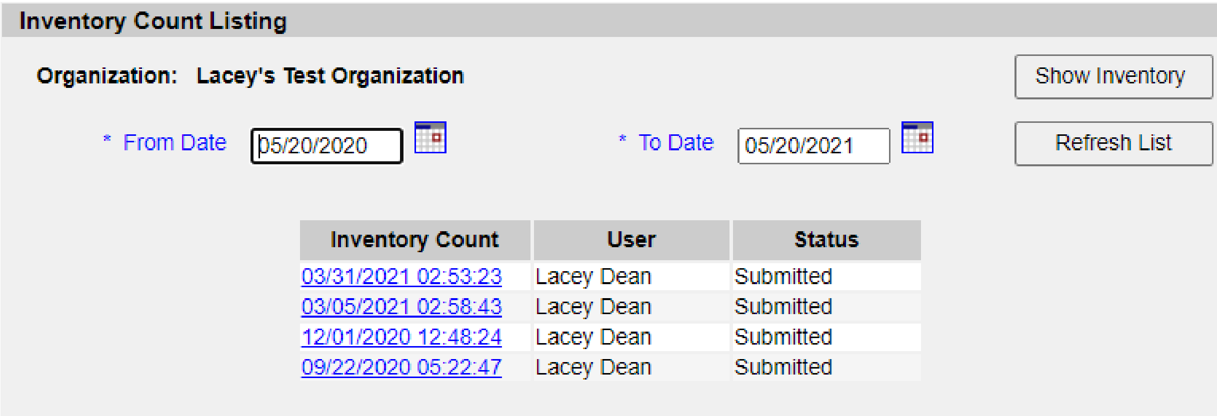
By clicking this button to submit my inventory count I confirm that my inventory has been reconciled and the quantities shown here represent a complete and accurate count of my inventory on hand as of today's date.

4. The pop-up message appears: *By submitting this inventory count you confirm that you have physically counted state-supplied inventory on hand and the count you are submitting is accurate and complete as of today's date. Click “OK” to submit your inventory count or “Cancel" to return to the Show Inventory screen.* Click OK.
5. The screen will refresh, and your inventory count will be submitted.

Note: All expired inventory must be returned out of inventory prior to submitting your reconciled inventory count.

To see a list of all inventory counts that have been submitted for your organization:

1. Click Inventory Count list under the Inventory section of the menu panel



2. A list of the previous year's inventory counts will be displayed. Clicking on the blue hyperlink within the Inventory Count column will display the inventory for the organization at the time the count took

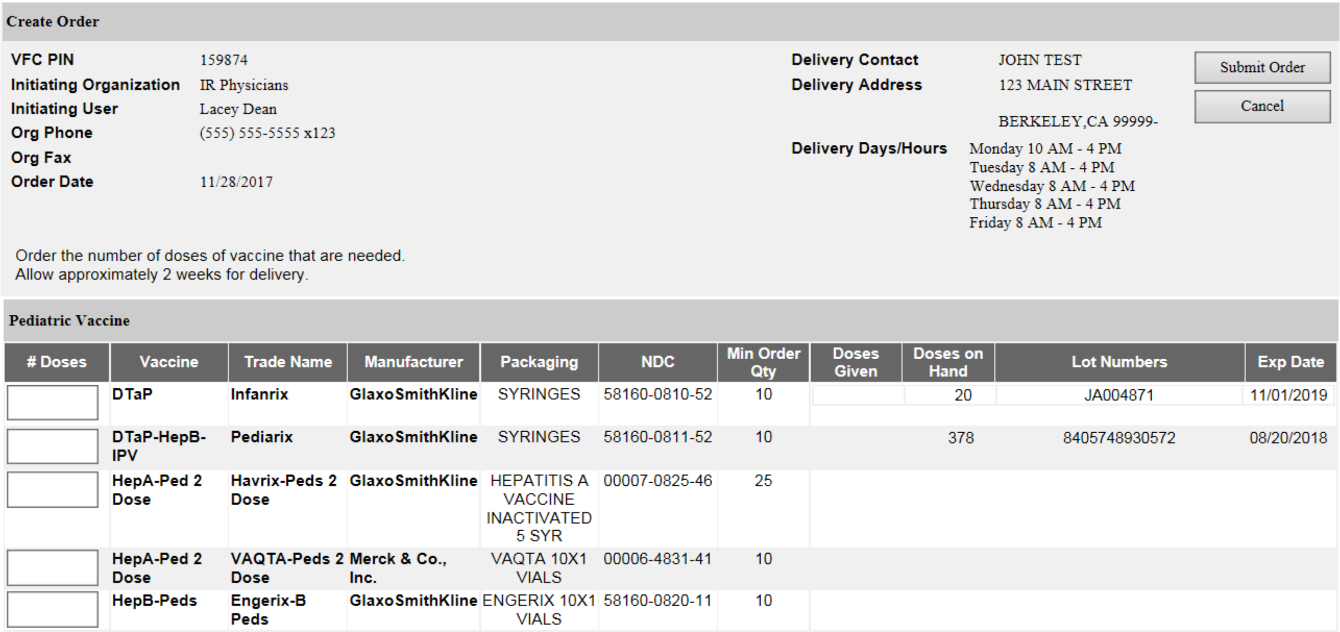
   place. To see inventory counts for a different date range, enter in the appropriate dates in the 'From Date' and 'To Date' field and click the Refresh List button to display the results.

ORDERING VACCINES

If you are a Vaccines for Children (VFC) provider, you may order vaccines once your organization has been trained and approved to order through ImmPact. Once an organization has received and accepted a vaccine shipment in ImmPact, it will automatically post the shipment to the organization's inventory.

To create a vaccine order in ImmPact:

1. Click **Manage Orders** under the Inventory section of the menu panel.
2. Click the **Create Order** button.


Create Order

VFC PIN	159874	**Delivery Contact**	JOHN TEST
Initiating Organization	IR Physicians	**Delivery Address**	123 MAIN STREET BERKELEY,CA 99999-
Initiating User	Lacey Dean		
Org Phone	(555) 555-5555 x123	**Delivery Days/Hours**	Monday 10 AM - 4 PM Tuesday 8 AM - 4 PM Wednesday 8 AM - 4 PM Thursday 8 AM - 4 PM Friday 8 AM - 4 PM
Org Fax			
Order Date	11/28/2017		

Submit Order

Cancel

Order the number of doses of vaccine that are needed.
Allow approximately 2 weeks for delivery.

Pediatric Vaccine

# Doses	Vaccine	Trade Name	Manufacturer	Packaging	NDC	Min Order Qty	Doses Given	Doses on Hand	Lot Numbers	Exp Date
	DTaP	**Infanrix**	**GlaxoSmithKline**	SYRINGES	58160-0810-52	10		20	JA004871	11/01/2019
	DTaP-HepB-IPV	**Pediarix**	**GlaxoSmithKline**	SYRINGES	58160-0811-52	10		378	8405748930572	08/20/2018
	HepA-Ped 2 Dose	**Havrix-Peds 2 Dose**	**GlaxoSmithKline**	HEPATITIS A VACCINE INACTIVATED 5 SYR	00007-0825-46	25				
	HepA-Ped 2 Dose	**VAQTA-Peds 2 Dose**	**Merck & Co., Inc.**	VAQTA 10X1 VIALS	00006-4831-41	10				
	HepB-Peds	**Engerix-B Peds**	**GlaxoSmithKline**	ENGERIX 10X1 VIALS	58160-0820-11	10				

3. You may receive a pop-up message if you have not submitted an inventory count within the last 14 days. Press the **OK** button and you will be directed to the Show Inventory screen in order to submit a reconciled inventory count. See the Inventory Count section above.
4. You may see three distinct sections on the Create Order page: Pediatric Vaccine, Adult Vaccine and Ancillary. For each section listed, there will be a # Doses column as well as Vaccine, Trade Name, Manufacturer, Packaging, NDC, Minimum Order Quantity, Doses Given, Doses on Hand, Lot Number, and Expiration Date.
5. Enter in the number of doses being ordered for each section (Pediatric and Adult) in the # Doses field. Click the **Submit Order** button.
6. Once your order is submitted, the Order Confirmation page will display the following message, "Your order has been saved and submitted to the state for review/processing".
7. From this page, you can **Print Order** and **Modify Order**. Click the **OK** button to return to the Manage Order page.
8. From the Manage Order page, you can track the status of your order. Pending orders can be modified or cancelled by clicking the "Pending" hyperlink on the Manage Order page.

Note: On the Create Order page under each section, the Vaccine/Trade Name, Manufacturer, Packaging, NDC number, Minimum Order Quantity, Doses Given, Doses on Hand, Lot Numbers and Exp Date are listed to assist with the ordering process.

Requesting Pandemic Vaccine

If you are an approved pandemic provider, you may request pandemic vaccine through ImmPact. Once an organization has received and accepted a vaccine shipment in ImmPact, it will automatically post the shipment to the organization's inventory.

To request a pandemic vaccine order in ImmPact:

1. Click **Pandemic Vaccine Request** under the Inventory section of the menu panel.

Pandemic Order Request

VFC PIN	159822	**Delivery Contact**	JOHN MARSHALL
Initiating Organization	IR Physicians	**Delivery Address**	123 MAIN STREET AUGUSTA, ME 04330
Initiating User	Lacey Dean	**Delivery Days/Hours**	Monday 10 AM - 4 PM Tuesday 8 AM - 4 PM Wednesday 8 AM - 4 PM Thursday 8 AM - 4 PM Friday 8 AM - 4 PM
Org Phone	(207) 555-5555		
Org Fax	(666) 777-8888		
Order Date	12/09/2020		

Submit Request

Cancel

Pandemic Vaccine

# Doses	Intent	Vaccine	Trade Name	Manufacturer	Packaging	NDC	Min Order Qty	Doses on Hand
	PED	COVID-19, mRNA, LNP-S, PF, 100 mcg/ 0.5 mL dose	Moderna COVID-19 Vaccine	Moderna US, Inc.	10 Dose Vial	80777-0273-99	100	140
	ADU	COVID-19, mRNA, LNP-S, PF, 100 mcg/ 0.5 mL dose	Moderna COVID-19 Vaccine	Moderna US, Inc.	10 Dose Vial	80777-0273-99	100	0
	PED	COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose	Pfizer COVID-19 Vaccine	Pfizer-Wyeth	CARTON, MULTI-DOSE VIALS	59267-1000-03	125	15
	ADU	COVID-19, mRNA, LNP-S, PF, 30 mcg/0.3 mL dose	Pfizer COVID-19 Vaccine	Pfizer-Wyeth	CARTON, MULTI-DOSE VIALS	59267-1000-03	125	0

2. You may receive a notification if you have not submitted an inventory count within the last 14 days. See the Inventory County section above.
3. Only pandemic vaccine the organization is approved to order will be displayed on the screen. A pandemic vaccine could be displayed up to three times for each ordering intention: Pediatric, Adult and Ancillary.
4. Enter the number of doses being requested for each intention (Pediatric, Adult) in the # Doses field. Click the **Submit Request** button.
5. Once your request is submitted, the following message will display, "Your vaccine request has been successfully submitted."
6. From the **Manage Orders** page, you can track the status of your order. Pandemic vaccine order numbers are displayed in blue text.
7. Once a pandemic vaccine request has been submitted the request cannot be modified or canceled by your organization, only Maine Immunization Program staff can modify the request.

CREATING TRANSFERS

ImmPact allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the **New Transfer** button.
3. Enter the following information:
   a. Sending Site will default to the organization you are logged in as.
   b. Receiving Organization is where the vaccine is being transferred to. (Receiving Organization must have their Inventory Count and Cold Chain Logs up to

date)

c. Choose between Active and Non-Expired or Inactive and Expired vaccines by clicking the appropriate radio button.
d. Number of doses in the Transfer Quantity field for each of the trade names being transferred

4. Click the **Save** button.
5. The message “Saved Successfully” appears to confirm your transfer.
6. You must click the **Packing List** button or the **Label** button to continue. You are not to print either document.

7. Click the **Ship** button when ready to ship the vaccines. Use either today’s date or enter an alternate date in MM/DD/YYYY format.
8. Click the **Ship** button. The message “Transfer Successfully Shipped” displays. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
9. To complete an internal transfer without printing shipping documents, click the **Finish Trans** button. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.

Shipping Documents

If your organization has sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click **Shipping Documents** under the Inventory section of the menu panel.
2. Click the **Packing List** button or the **Label** button. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today’s date, using MM/DD/YYYY format.
4. Click the **Ship** button. The message “Transfer Successfully Shipped” displays in the upper right of the Manage Transfer page.

ACCEPTING OR REJECTING TRANSFERS

Transfers made through ImmPact and received by the provider organization must be accepted, rejected or partially accepted so that ImmPact can post and track inventory properly. Organizations will also accept orders shipped to them via the Manage Transfers screen. To accept or reject a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. The Manage Transfer page categorizes transfers as follows:
    a. **Outbound Transfer:** Displays transfers that are outbound from your organization
    b. **Inbound Transfer:** Displays transfers that are inbound to your organization
    c. **Historic Transfer:** Displays completed transfers

3. To proceed to the Receive Transfers page (where you may accept or reject transfers), locate the Inbound Transfer section and click the date (which is a hyperlink) in the Create Date column.
4. Ensure that the corresponding Type column states Transfer. On the Receive Transfer page, you may accept the entire transfer, reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept Transfer

1. Click the **Accept Transfer** button to accept the transfer and add all transfer items into inventory.
2. Click the **OK** button to continue with the acceptance and be returned to the Manage Transfers page.

Reject Transfer

1. Click the **Reject Transfer** button to reject the entire transfer.
2. Select one of the following reasons from the Enter Rejection Reason drop-down list.
    - **a. Damaged**
    - **b. Not Wanted**
    - **c. Wrong Vaccine**
    - **d. Never Received**
3. After selecting a reason, click the **Reject** button.
4. Click the **OK** button to continue with the rejection and be returned to the Manage Transfers page.

Partially Accept

1. Click the **Partially Accept** button.
2. At the Partially Accept Transfer page, select the dose quantity of each vaccine you wish to accept and a rejection reason for those you wish to reject.
3. Click the **Save** button.
4. Click the **OK** button to continue with partially accepting the transfer and to be returned to the Manage Transfer page.

Shipping and Restocking Transfers

When a transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, Never Received, or Damaged it is necessary to ship and restock the transfer in the system so that the doses are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To ship the rejected quantities back to the original sender:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the appropriate transfer date (which is a hyperlink) under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer page by entering the date in MM/DD/YYYY format.
4. Click the **Ship** button.

Accepting a Rejected Transfer

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the transfer date of the rejected transfer (which is a hyperlink) under the Create Date column.
3. Click the **Save** button at the Restock Rejected Transfer page. The Manage Transfer page will display, and the transfer will be added to the Historical section of the page.

CHAPTER 10: MANAGING PATIENTS

In this chapter:

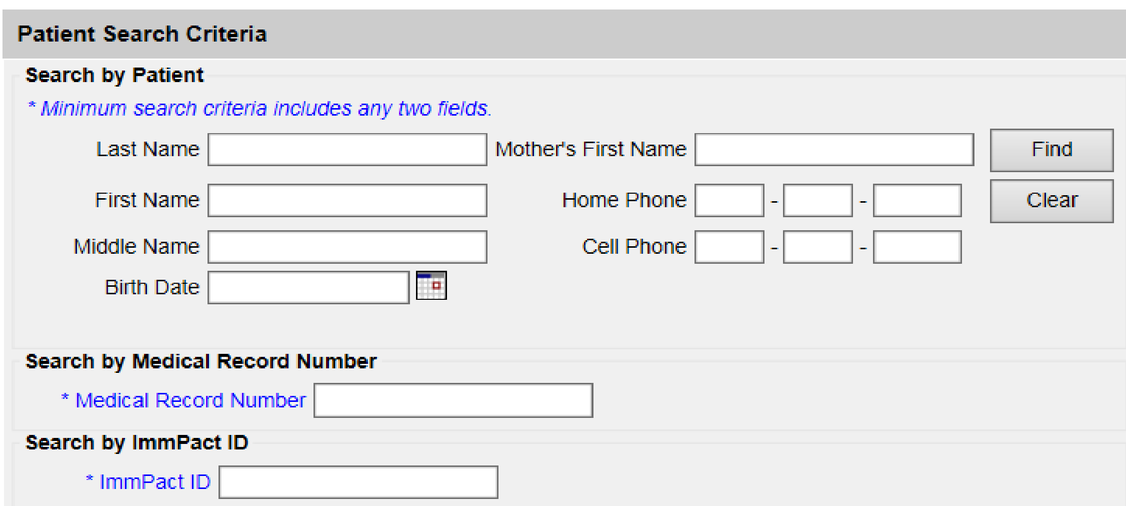
ImmPact receives immunization information from multiple provider sources, including birth record downloads. Always attempt to find a patient in ImmPact before entering them as a new patient. ImmPact will attempt to de-duplicate patient records (i.e., compare entered information against information saved to the system for duplicate patients) prior to saving the information on the Enter New Patient page.

FINDING PATIENTS

Searching for a patient in ImmPact before entering them as new will prevent duplicate patient records from being entered into the system. There are many different combinations of search criteria that can be used to locate patients in ImmPact. Remember when searching for patients, you are searching on a statewide level and not just within your organization therefore, more information is not always better. Entering too much information about a patient will decrease the odds of locating the patient in the database. To review recommended search criteria examples, please see the Examples of ImmPact Search Criteria section in this chapter.

To search for a patient in ImmPact:

1. Click **Manage Patient** under the Patients menu group on the menu panel.



2. In the Patient Search Criteria box, you have several options for finding the patient. It is important to note that if you are searching by patient information (not MRN). The minimum search criteria includes any two fields.
   a. **Last Name:** Entering the first two letters of the patient's last name, along with the birth date, will initiate a search of all patients matching those letters and birth date. The last name requires two or more characters. Remember patients may go by more than one last name, so vary your search options.

b. **First Name:** Entering the first two letters of the patient's first name, along with the birth date, will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients with a single-letter first name.

Entering Names
On all first and last names entered for patient searches, ImmPact disregards spaces, apostrophes, and hyphens entered.

c. **Middle Name:** Entering the first two letters of the patient's middle name along with the birth date will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients with a single-letter middle name.
d. **Mother's First Name:** Entering the first two letters of the mother's first name will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients whose mother has a single-letter first name.
e. **Phone:** Entering the patient's main 7-digit phone number (area code not required) will identify patients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.
f. **Cell Phone:** Entering the patient's main 7-digit phone number (area code not required) will identify patients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.

3. Click the **Find** button.
4. If multiple records are found matching the criteria you entered, a table listing up to 75 possible matches with detailed information on each patient displays. To choose a patient from this list, click the patient's last name (which is a hyperlink).

Possible Matches: 2

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status	ImmPact ID
TEST	PATIENT		07/02/2015			U	A	264030
TEST	PATIENT		07/01/2015	0001		M	A	263928

5. If only one patient matches your search, ImmPact displays that patient's demographic page.
6. If no patients match your search, review the search criteria information you entered for accuracy. If you suspect the patient has not been entered into ImmPact, proceed to Entering a New Patient later in this chapter.
7. If multiple records are found matching the criteria you entered and there are over 75 matches, ImmPact displays a warning that there are too many patients matching your search criteria. In this situation, refine your search criteria to limit your patient list.

Finding Patients with No First Name

- Search using only the last name and birth date. This will return patients matching those letters and birth date, including patients with or without a first name.
- Alternatively, search using the last name and birth date, and enter "No First Name" in the first name field. This will narrow the search results to patients with no first name.

Patient vs. Immunizations

Patients and Immunizations are the same query; in other words, they both utilize the patient search function. The difference is that the Patient search under Patients query will display the Demographic page, while the patient search under Immunizations query will display the patient's Immunization History page.

Searching by MRN

A patient may have numerous Medical Record Numbers s; each MRN is organization dependent. Entering the MRN will produce a single name match. To find a patient using this method the MRN must have been entered previously in the patient record in ImmPact and the birth date is not required. When searching with MRN, all other entered information is ignored.

Examples of ImmPact Search Criteria

A minimum search of any two fields.

Patient DOB and any combination of the following:

- Last Name
- First Name
- Middle Name
- Mother's First Name
- Phone Number
- Cell Phone Number
- Medical Record Number
- ImmPact ID

USING DROP-DOWN LISTS IN IMMPACT

When entering information on new patients or editing patient information, you will use drop-down lists—fields that contain a list of options from which you may choose—rather than text fields for certain input data. The advantages of drop-down lists over text fields include:

- Ease of use. Allows users to quickly fill in a data field without typing in the information.
- Health Level 7 (HL7) compliance. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily. With predefined drop-down lists, ImmPact stays in HL7 compliance.
- Uniformity of entered data. By choosing information from a drop-down list, users do not risk entering conflicting information that could decrease the accuracy of ImmPact reports.
- Confidentiality. By using standard drop-down lists, ImmPact avoids confidentiality issues associated with the typing of free text that could be construed as medical record information.

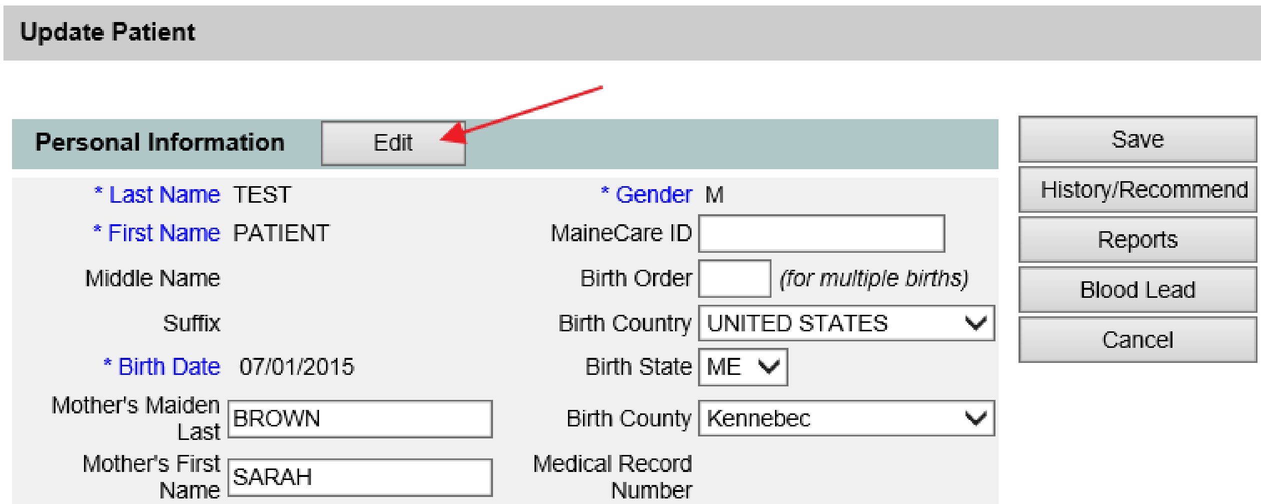
ENTERING PATIENT INFORMATION

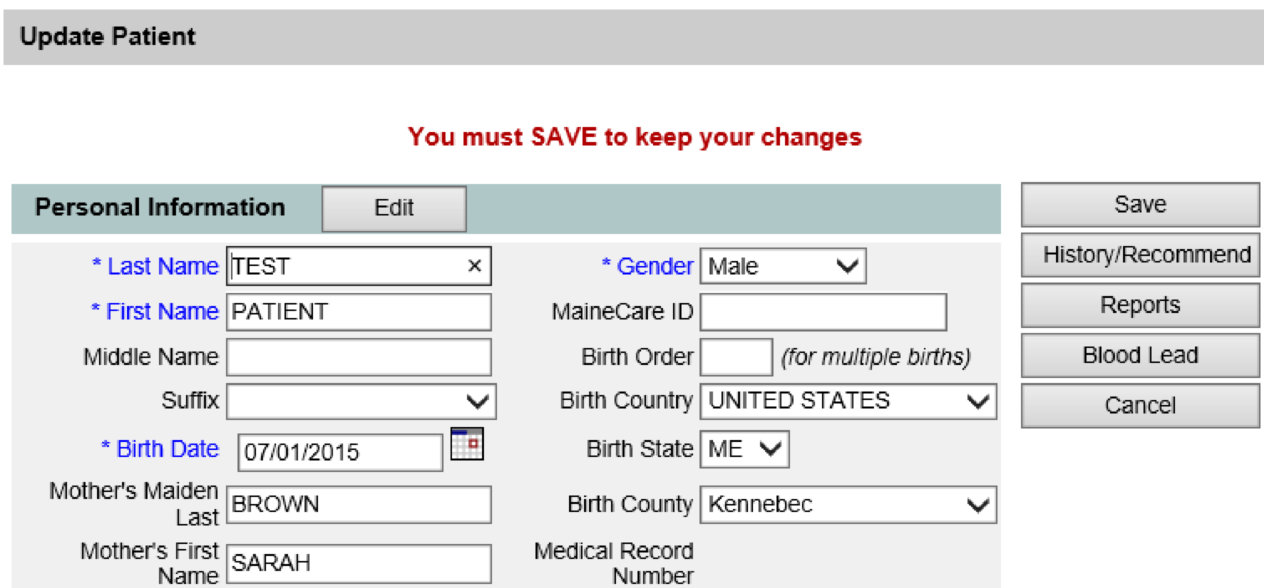
In order to enter a new patient, the user will click the patient search option under patients. This allows the user to search for the patient to verify if the patient is in ImmPact. If the patient is not in ImmPact, they can click the Add New button and this, allows you to input information for a new patient.

The Update Patient and Enter New Patient pages are divided into the following sections: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patient Notes. Except for required demographic information, all other information in these fields is optional. Each of these fields is explained in detail below.

Editing Patient Information

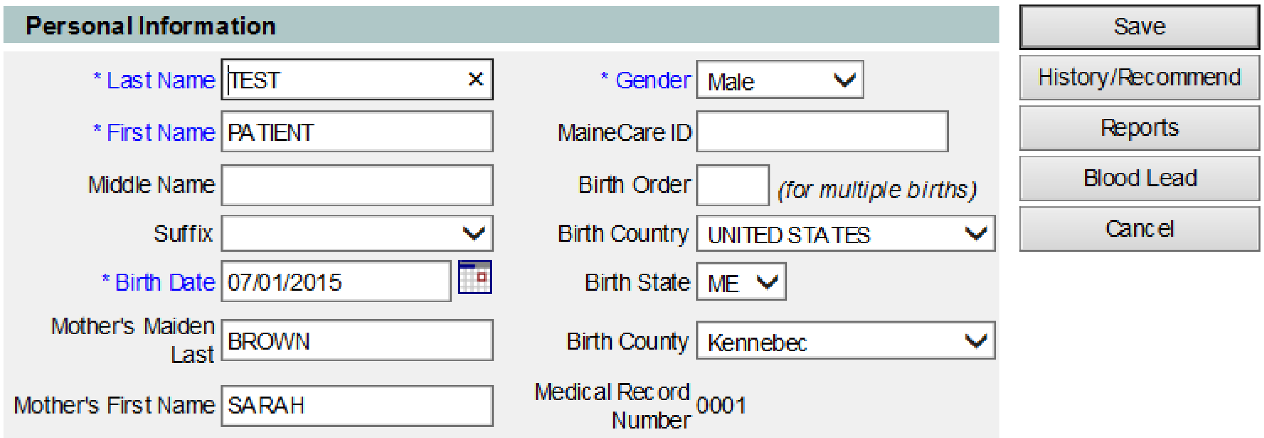
The Update Patient demographics page allows you to update or change specific, non-immunization information relating to any patient in ImmPact. Upon landing on the Update Patient screen, the following fields are non-editable: Last Name, First Name, Middle Name, Suffix, Birth Date and Gender. In order to make edits to these fields, the user will click the 'Edit' button in the Personal Information header. Selecting the 'Edit' button will unlock the fields and allow the user to make any necessary changes. Once all updates are complete, the user *must* select the Save button to retain the changes.





Personal Information Section

The Personal Information Section at the top of the Demographic and Enter New Patient pages contains patient-specific information used primarily to identify patients when conducting patient searches. All fields shown in blue font are required.
Mother's First Name and Last Name are highly recommended for patient matching. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.



- **Last Name:** required field
- **First name:** required field
- **Middle name:** optional field
- **Suffix:** optional field.
- **Birth Date:** required field
  - Complete the field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field, clicking the appropriate date, and then clicking the OK button.
- **Mother's Maiden Last Name:** highly recommended field
  - ImmPact will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.

- **Mother's First Name:** highly recommended field
    - ImmPact will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.

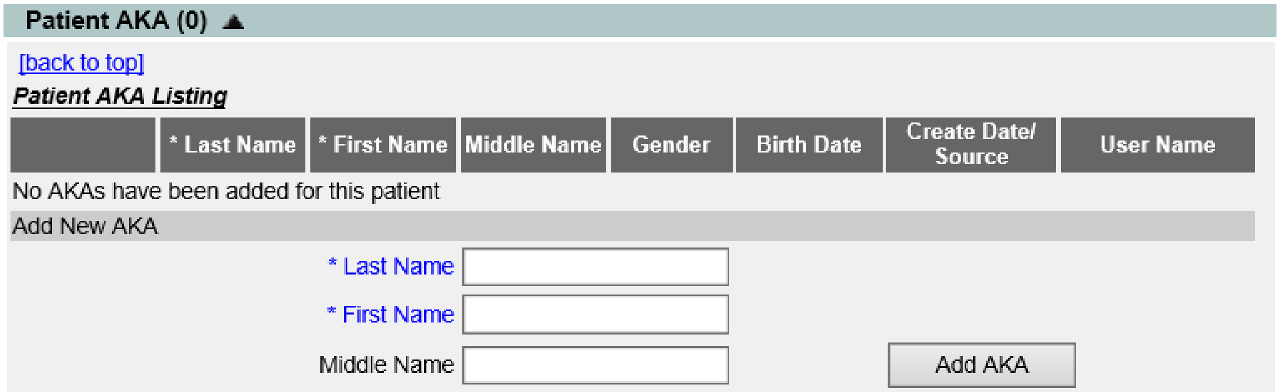
Note: It is critical that the information in the Mother's Maiden Last Name and Mother's First Name fields is accurate. If you do not have the correct information leave these fields blank. Do not use a fake name, foster mother, or type "unknown" in the fields.

- **Gender:** required field
    - This field defaults to male.
- **MaineCare ID:** optional field
- **Birth Order:** optional field
    - This identifies the birth order of the patient and should only be used for multiple births (e.g., twins, triplets).
- **Birth Country:** defaults to United States
    - Use the drop-down list to select a different country of birth, if applicable.
- **Birth State:** optional field
    - Use the drop-down list to select a state of birth, if applicable.
- **Birth County: optional field**
    - Use the drop-down list to select a county of birth, if applicable.
- **Medical Record Number:** displays organization's primary patient identifier (See the Organization Information section for adding/removing patient identifiers.)

Patient AKA Section

The Patient AKA section gives other names that the patient may be known as. This section also displays a previous Gender or Birth Date that was associated with the patient. A patient can have several different AKAs.

1. Click the **Patient AKA** heading to expand the information in that section.



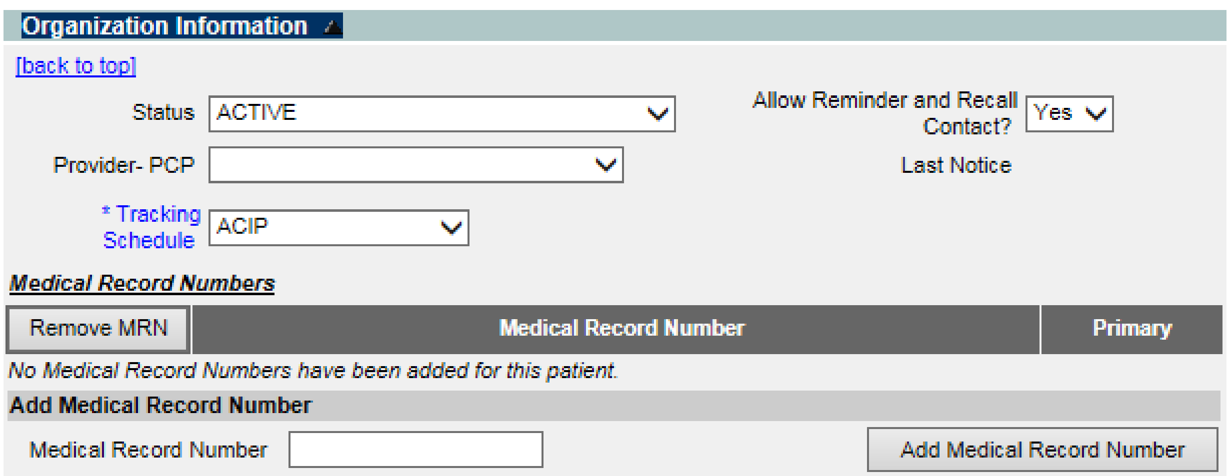
a. Last Name: required field when entering AKA information
b. First Name: required field when entering AKA information
c. Middle Name: optional field

Note: You must click the save button at the top of the screen to finalize any changes to the patient record.

Organization Information Section

The Organization Information section shows organization-specific information about the patient.

1. Click the **Organization Information** heading to expand the information in that section.



a. **Status:** Click ACTIVE from the drop-down list if you want this patient to be associated with your organization, meaning he or she is receiving services from you. When you specify a patient as INACTIVE, you make him or her inactive for your organization only.

ACTIVE	Patient associated with your organization
INACTIVE-LOST TO FOLLOW UP	Patient has not responded to follow up contact
INACTIVE-MOGE	Moved or gone elsewhere
INACTIVE-MOOSA	Moved out of service area
INACTIVE-ONE TIME ONLY	Received an immunization once but is not a regular patient
INACTIVE-OTHER	
INACTIVE-DECEASED	Patient is deceased.
INACTIVE-UNKNOWN	An individual made known to an IIS via an electronic interface, perhaps with demographic and historical data, but without that individual's status specified. This situation can occur because of health insurance companies or Providers providing historical data via an electronic interface. (AIRA Definition)

b. **Provider-(PCP):** Fill in the patient's primary care physician (PCP) or health care organization from the drop-down list, if provided. This information is used only for reporting.
c. **Tracking Schedule:** This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects recall and reminder notices and Comprehensive Clinic Assessment Software Application (CoCASA).
d. **Allow Reminder and Recall Contact?** By choosing Yes from the drop-down list you are allowing reminder/recall notices to be sent to this patient when you run the reminder/recall report. If the patient's parent chooses not to have, reminder/recall notices sent choose No from the drop-down list to exclude the patient from the report.
e. **Medical Record Numbers:** A patient may have numerous patient identifiers associated with him or her; each identifier is organization dependent. To enter a patient identifier, type it in and click the Add Medical Record button. Multiple Medical Record numbers can be saved, and a primary patient identifier can be set by selecting the Primary option button

Deleting an Existing Record

To delete an existing patient identifier:

1. Click the patient identifier you would like to remove by checking the appropriate box on the left.
2. Click the **Remove Medical Record** button.
3. Click the **Save** button at the top of the page.

Generation of Reminder and Recall Notices

When running the reminder/recall report, letters are generated for every patient when the following conditions are met:

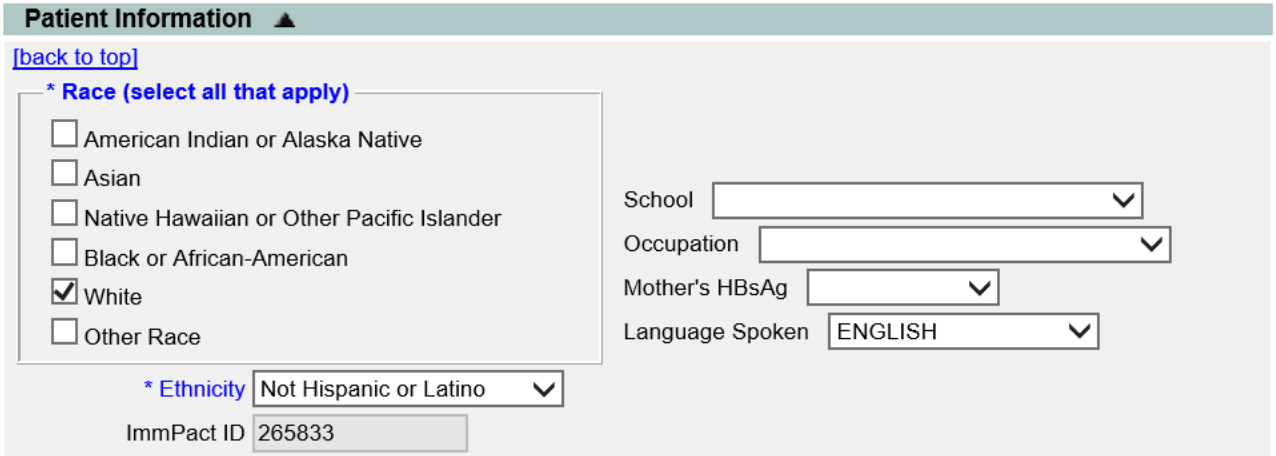
- Patient's status is not set to an INACTIVE status or INACTIVE-DECEASED on the Organization Information tab
- Allow Reminder and Recall Contact? Indicator on the Organization Information tab is set to Yes.
- Patient has sufficient address information listed in the Address Information section

Note: Once a status of INACTIVE-DECEASED has been entered in the Status field, the field can no longer be edited by the organization. To change a status of INACTIVE-DECEASED contact the ImmPact Help Desk.

Patient Information Section

The Patient Information section gives additional information about the patient.

1. Click the **Patient Information** heading to expand the information in that section.

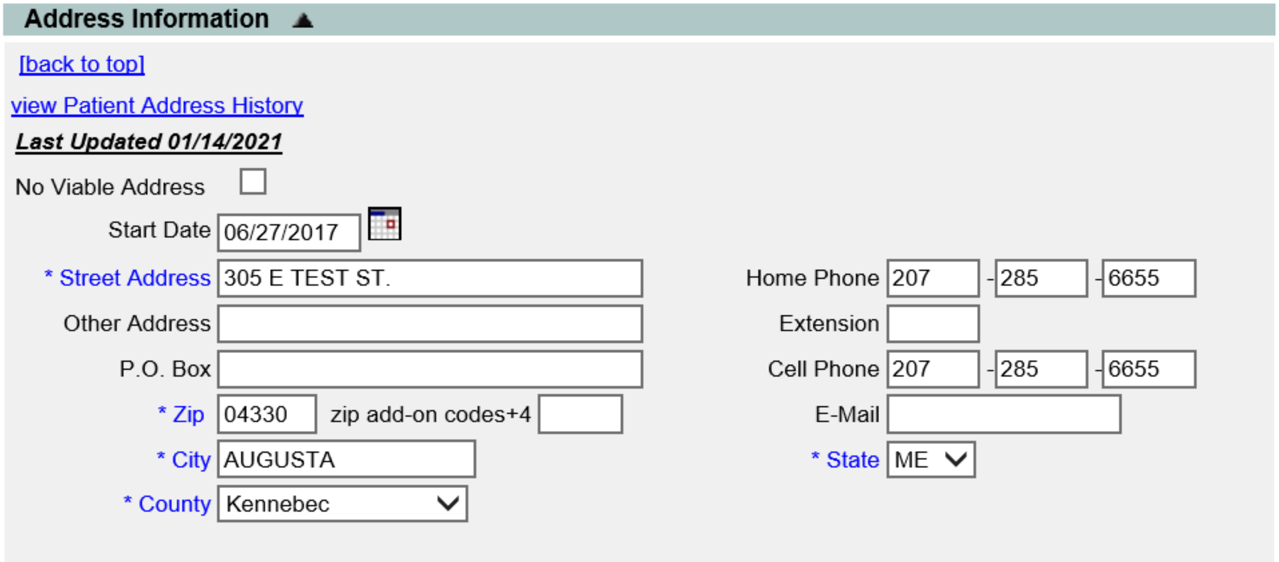


a. **Race:** Required field. Click the patient's race by selecting the appropriate boxes. Multiple races may be selected.
b. **Ethnicity:** Required field. Click the patient's ethnic background from the drop- down list provided.
c. **ImmPact ID:** This is the ImmPact ID for the patient and is not editable.
d. **School:** Fill in the patient's school from the drop-down list, if provided. This information is used only for reporting and must be set up by the organization's ImmPact Super User. For instructions on how to set up the School field, refer to the Managing Schools section in Chapter 8.
e. **Occupation:** Click the patient's occupation from the drop-down list, if applicable. This field can be used in emergency response situations when certain occupation groups are targeted.
f. **Language Spoken:** Click the primary language spoken by the Patient; this determines the language of the Reminder/Recall letters. English and Spanish are the only options.

Address Information Section

The Address Information section allows you to identify the current address of the patient and view previous addresses.

1. Click the **Address Information** heading to expand the information in that section.



a. **No Viable Address:** Mark this checkbox if information was sent to the patient and the information was returned as not deliverable.
b. **Start Date:** Fill in the start date of the address using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the OK button to enter the Start Date. This is the Start Date of the patient's New Address
c. **Street Address:** Required field. Street Address of the patient.
d. **Other Address:** Additional address information - a suite number or apartment number could be entered here.
e. **P.O. Box**: Post office box of the patient
f. **Zip:** Required field. Zip code of the patient
g. **+4:** Extended Zip code numbers of the patient if available
h. **City:** Required field. City (or town) of the patient's address
i. **State:** Required field. State of the patient's address
j. **County:** Required field. County of the patient's address
k. **Phone Number:** Phone Number
l. **Extension:** Phone extension if applicable
m. **Cell Phone:** Cell Phone Number
n. **Email:** Patient's email address

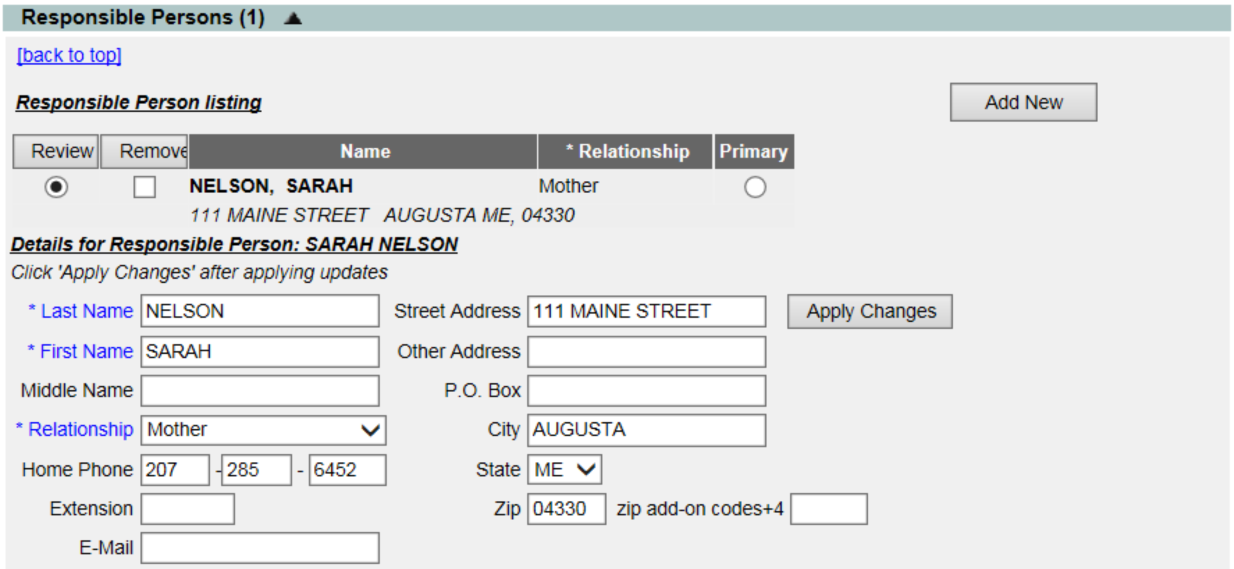
2. Clicking **View Patient Address History** will present a window with the patient's address history, if available.

Responsible Persons Section

The Responsible Persons section allows you to identify patient emergency contact information. The Reminder/Recall reports feature can also utilize the

Responsible Persons information. The only required fields under this section are the Last Name, First Name, and Relationship fields.

- Click the **Responsible Persons** heading to expand the information in that section.



To edit an existing responsible person:

1. Click the **Review** radio button next to the name of the person you wish to edit.
2. Click the **Review** button.
3. Change or add information for the fields listed.
4. Click the **Apply Changes** button.
5. Click the **Save** button at the top of the screen.
6. To enter a new responsible person, click the **Add New** button, and then enter information into the following fields:
    a. **Last Name:** required field
    b. **First Name:** required field
    c. **Middle Name:** optional
    d. **Relationship:** required field
    e. **Phone Number:** responsible person's telephone number, including the area code
    f. **Extension:** responsible person's extension to the above telephone number, if any
    g. **Email:** responsible person's Email address
    h. **Street Address:** responsible person's street address

i. **Other Address:** responsible person's additional address information - an apartment number could be entered here
j. **P.O. Box:** responsible person's post office box, or mailing address, if different from the street address.
k. **City:** city or town.
l. **State:** state
m. **ZIP:** ZIP code
n. **+4:** +4 code in this field if known.

7. To enter a new responsible person and save the information you entered in the Responsible Person Listing, or to view the next responsible person's record, click the **Save** button.
8. To clear existing information and enter a new responsible person, click the **Add New** button.

Deleting an Existing Responsible Person Listing

1. Select the **Remove** check box next to the record you wish to delete on the Responsible Person Listing table.
2. Click the **Remove** button.
3. Click the **Save** button at the top of the screen.

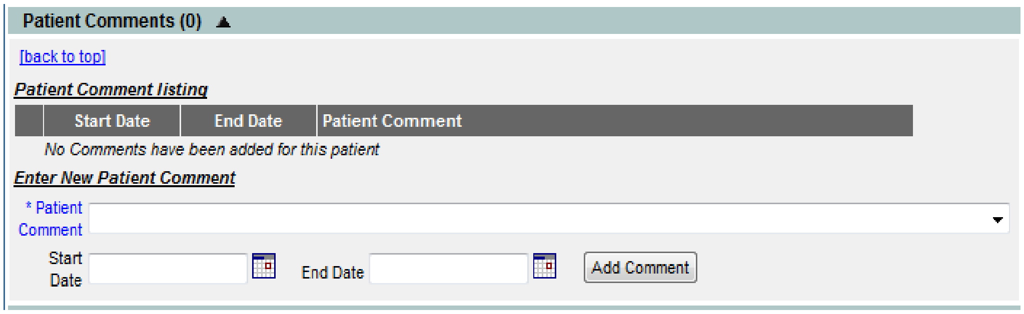
Patient Comments Section

The Patient Comments section allows you to enter immunization-related comments, such as contraindication information for a patient. The patient comments list is derived from a pre-selected CDC-standardized list and is displayed in drop-down list form.

Although the Start Date is not a required field, a start date must be entered with a contraindication comment in order to properly interact with the immunization schedule for the specified vaccine group. If a start date is not entered, the contraindicated vaccine group will still be recommended.

The patient comments are visible at the top of the Immunization History and Edit Immunization pages and the Patient Immunization Records. When using the Print button on the Immunization History page, the comments are displayed on separate lines in the Comments box.

1. Click the **Patient Comments** heading to expand the information in that section.



2. Click the appropriate comment/contraindication from the Patient Comment drop-down list.
3. Enter the date to which the comment refers in the Start Date field. Complete the field using the MM/DD/YYYY format or use the pop-up calendar. Click the **OK** button.
4. If applicable, enter the date to which the comment ends in the End Date field. Complete the field using the MM/DD/YYYY format or use the pop-up calendar. Click the **OK** button.
5. To enter the comment into the Patient Comments Listing, click the **Add Comment** button.
6. Click the **Save** button at the top of the page.

Immunity Comments

Immunity comments are linked to vaccine group recommendations. If a patient has an immunity comment and a Start Date is specified, a recommendation for that vaccine group will not display on the patient's record.

Patient Refusal of Vaccine Comments

ImmPact users should enter refusal comments with appropriate Start Dates to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a patient in ImmPact. Refusal of vaccine will not affect the Forecaster.

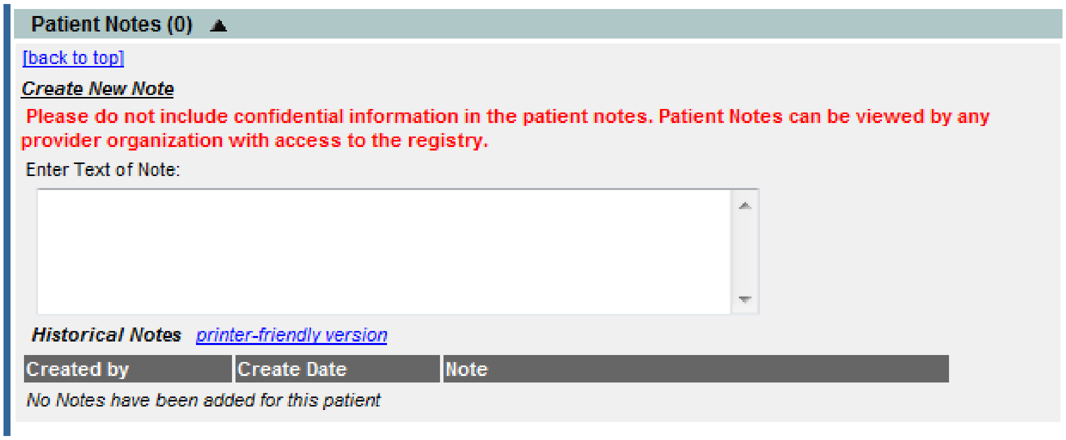
Deleting an Existing Comment

1. Select the **Remove** check box next to the comment you wish to delete on the Patient Comment Listing table.
2. Click the **Remove** button.
3. Click the **Save** button.

Patient Notes Section

The Patient Notes section allows you to enter notes for a patient that may be useful to other clinicians.

1. Click the **Patient Notes** heading to expand the information in that section.



2. Enter Text of Note: Enter text up to 4,000 characters in the text box.
3. Click the **Save** button at the top of the page.

Notes cannot be removed by users. To remove a note, contact the ImmPact Help Desk.

Saving Patient Information

To save information on the Demographic/Enter New Patient pages:

Save:	When clicked, the Save button at the top of the page will save all information fields within each section: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patients Notes. Once the patient data is saved the message “Patient record successfully saved” will appear at the top of the Personal Information header.

Deduplication of Patient Records

After you enter a new patient and click one of the buttons that will save the data, ImmPact initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists.

If, after attempting to save a new patient, you receive a message box titled “Patient Match Detected”, ImmPact has determined that the patient you are attempting to save may already exist in the database. A table below the message box will contain one or more names of potential matches. Click each last name to display his or her information. ImmPact will identify matching patients even if the patient has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your patient's record. Review Address, Responsible Persons, and any other information you must identify matching data.

Patient Match Detected

Based on the information you entered, the system has determined the patient may already exist in ImmPact.
Please review the demographic information for the patient below and if it does not appear to be your patient, you may then click the **Create New Patient** button.

Please keep in mind that if you choose to ignore a patient match and create a new record, that patient will have two records in ImmPact, neither of which will be complete and accurate!

Create New Patient

Possible Patient Matches: 1

Last Name	First Name	Birth Date	Primary Medical Record Number	Mother's First Name	Gender	Status
TEST	PATIENT	07/02/2015			U	

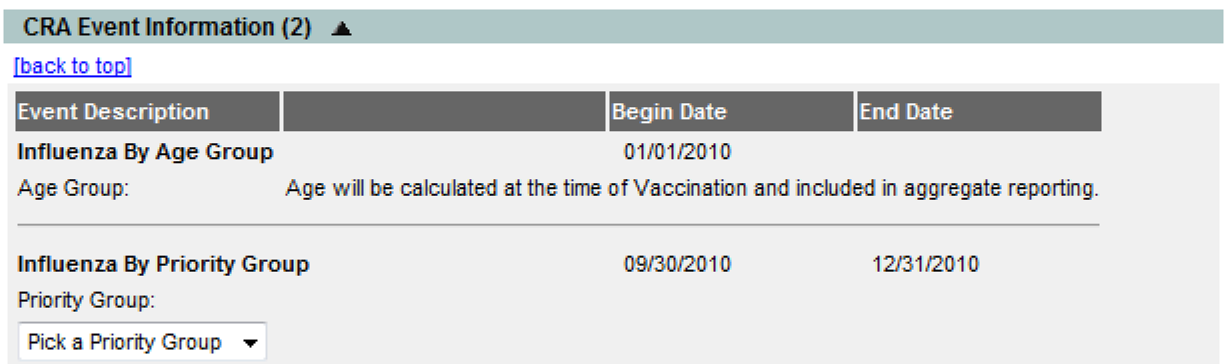
If you do not find a match for your patient after reviewing all the related names, click the Create New Patient button. A confirmation box will appear; click the OK button. Be aware that if you do override the listed matches and create a duplicate record for a patient, it will be difficult to manage the patient's immunization and personal information; the registry will lose its accuracy and efficiency. If you identify possible duplicate patient records, you should call the ImmPact Help Desk immediately.

COUNTERMEASURE AND RESPONSE ADMINISTRATION MODULE (CRA)

Note: In the event of a public health emergency, ImmPact may be used to track the administration of vaccine. In some instances, specific groups may be identified as being at higher risk than the general population and targeted as priority groups to receive the vaccination first.

CRA Event Information Section

If your organization is selected for an event, the CRA Event Information section will be displayed below the Patient Information section of the Demographic page. The CRA Event Information section is used to collect Public Health data during a pandemic response event or preparedness exercise. During an ongoing event, the CRA Event Information section will be displayed on the Edit/Enter New Patient page. Based on candidate screening, select the appropriate priority group category for each patient.



- Effective Events are displayed.
- The Age Group is not required and will be calculated at the time of vaccination.
- The Priority Group Value (Code) is displayed in the drop-down list. When selected, a full description of the selected priority group will be listed to the right of the drop-down list.

CHAPTER 11: MANAGING IMMUNIZATIONS

In this chapter:

ImmPact allows you to view and manage historical immunization information and add new immunizations for a patient. ImmPact also recommends immunizations based on the ACIP tracking schedule.

To access immunization information for a specific patient:

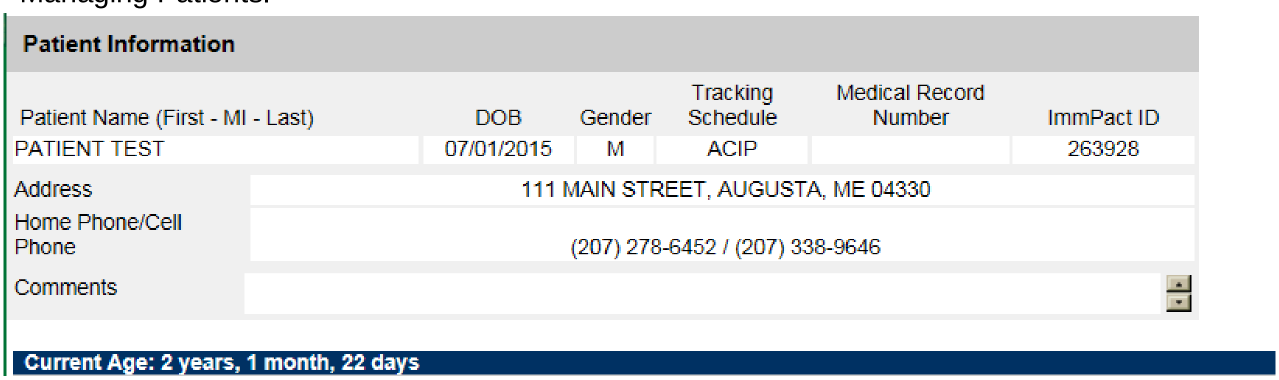
1. Click **Patient Search** under the Immunizations section of the menu panel. This will display the Patient Search page. For information on finding patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, click the History/Recommend button to display the patient's Immunization Record page.

VIEWING PATIENT IMMUNIZATION INFORMATION

The Immunization Record page holds a large amount of information on each patient in ImmPact. The page has three sections: Patient Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule.

Patient Information

The Patient Information section at the top of the Immunization Record page displays information on the patient, such as name, DOB, gender, Tracking Schedule, Patient ID, address, phone, and a scrollable list of comments. Use this information to verify that the patient indicated is the patient for whom you were searching. To edit this information, Click the Edit Patient button and refer to the Editing/Entering Patient Information section in Chapter 10, Managing Patients.



Patient Information

Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Medical Record Number	ImmPact ID
PATIENT TEST	07/01/2015	M	ACIP		263928

Address	111 MAIN STREET, AUGUSTA, ME 04330
Home Phone/Cell Phone	(207) 278-6452 / (207) 338-9646
Comments	

Current Age: 2 years, 1 month, 22 days

Between the Patient Information section and the Immunization Record section, the patient's exact age is shown in a solid blue field. The age also displays on the printable version of this page.

Immunization Record

This table lists all the immunizations the patient has received to date that have been entered into ImmPact. Immunizations are listed alphabetically by vaccine group and ordered by Date Administered.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	09/01/2015	1 of 5	DTaP, NOS [DTaP, NOS ®]				Yes	
	11/01/2015	2 of 5	DTaP, NOS [DTaP, NOS ®]				Yes	
	01/01/2016	3 of 5	DTaP, NOS [DTaP, NOS ®]				Yes	
	10/01/2016	4 of 5	DTaP, NOS [DTaP, NOS ®]				Yes	
HepA	07/01/2016	1 of 2	HepA, NOS [HepA, NOS ®]				Yes	
HepB	07/01/2015	1 of 3	HepB, NOS [HepB ®]				Yes	
	08/01/2015	2 of 3	HepB, NOS [HepB ®]				Yes	
	01/01/2016	3 of 3	HepB, NOS [HepB ®]				Yes	
MMR	07/01/2016	1 of 2	MMR [MMR II ®]				Yes	
Polio	09/01/2015	1 of 4	Polio, NOS				Yes	

Vaccine Group: the vaccine group name

Date Administered: the date the patient was given the vaccine. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click this date.

Series: denotes the sequence number within the immunization series. A vaccine may show as invalid because the patient was not old enough to receive it or not enough time has elapsed between doses." Partial Dose" will display if the shot is flagged as a partial dosage.

Trade Name*:* the manufacturer's trade name of the vaccine

Dose: indicates whether full, half or multiple doses were administered to the patient. If the Dose field is blank, assume that the default "full" dose was administered.

Owned?: If the value in the owned column is blank, the immunization data is owned by your organization. This is a result of either manual data entry of this information or having sent it via data exchange. This only indicates the organization submitting the data; it has nothing to do with the organization that administered the shot to the patient.

“If the value in the Owned?” column is “No”, the immunization data is not owned by your organization.

This indicates that your organization did not enter the shot information into ImmPact. Click “No” to display who owns the shot information.

Reaction: If this column indicates “Yes” and appears in red, this means a reaction to a vaccine was recorded. To view the patient’s reaction, Click the “Yes” link in the Reaction column or Click the notepad icon in the “Edit” column.

Hist?: If this column indicates “Yes”, this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into ImmPact).

Edit: When you click the notepad in this column, you will be able to edit some fields for the recorded immunization using the Edit Immunization page, if the immunization is owned by your organization or is historical. You will also be able to see more details about the immunization, including vaccine lot number and VFC status (if applicable). Click the Edit button to enter a reaction to the immunization or mark it as a subpotent dose. Details on editing immunizations are covered in more detail later in this chapter.

Note: Owned vs. Not Owned Immunizations

A single provider does not own any of the patients within ImmPact, but an organization does own the immunization data it enters into the system. If the Owned column on the Immunization Record table shows a “No” for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

Any provider may edit a historical immunization, but “new” or non-historical shots may only be edited by the organization that administered the vaccine and entered the data in ImmPact. The exception is that any user can enter a reaction to any immunization or mark it as a subpotent dose.

Validation of Combination Vaccines

ImmPact validates each vaccine group component separately when recording combination vaccines. For example, if Comvax, which is a combination of Hib and Hep B was administered, and only one component is valid, that component will be treated as if it were a single vaccine and validated. The other component will be displayed as “Not Valid”. The component that is not valid will not be counted in series.

Vaccines Recommended by Selected Tracking Schedule

This table, known as the Forecaster, lists all vaccines recommended by the ACIP tracking schedule associated with the patient. Immunizations are listed alphabetically.

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
☐	DTP/aP	DTaP, NOS	03/30/2008	05/02/2008	06/02/2008
☐	HepA	HepA, NOS	01/02/2009	01/02/2009	08/02/2009
	HepB	HepB, NOS	Complete		
☐	Hib	Hib, NOS	04/02/2009	04/02/2009	04/02/2009
☐	Influenza-seasnl	Influenza, NOS	07/02/2008	08/01/2010	08/02/2008
☐	MMR	MMR	01/02/2009	01/02/2009	05/02/2009
☐	PneumoConjugate	PCV7	01/02/2010	01/02/2010	01/02/2010
☐	Polio	Polio, NOS	02/13/2008	03/02/2008	04/02/2008
	Rotavirus	Rotavirus, NOS	Maximum Age Exceeded		
☐	Varicella	Varicella	01/02/2009	01/02/2009	05/02/2009

Add Selected

Select: allows users to manually check inclusion in the Vaccines Recommended section. When the Add Selected button is clicked, the Enter New Immunizations page will open with the check-marked selections displayed.

Vaccine Group: lists the vaccine group name. To view the tracking schedule information for the selected immunization, click the vaccine group name.

Vaccine: lists the vaccine name

Earliest Date: the earliest date that the patient may receive the vaccine

Recommended Date: the recommended date that the patient should receive the vaccine

Past Due Date: the date at which the patient is past due for the immunization.

Immunization Color Coding

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. For a detailed listing of color definitions click the online help icon on the Immunization Record page. The colors applied to the dates within the columns are defined as follows:

Green: Color that will fill the background for the Vaccine Group and Date columns when a dose in that family is recommended or past due.

Gray: Vaccine statuses that will show gray color: Complete, Contraindicated, Maximum Age Exceeded, Immunity, and Medical Exemption.

Other Features on the Immunization Record Page

The Immunization Record page contains links to other ImmPact functions:

Edit Patient: Clicking this button will return you to the Demographic page for the patient

Reports: Clicking this button will bring you to the Reports Available for This Patient page. You may generate Patient-specific reports. Refer to Forms and Reports in Chapter 12 of this manual for more information.

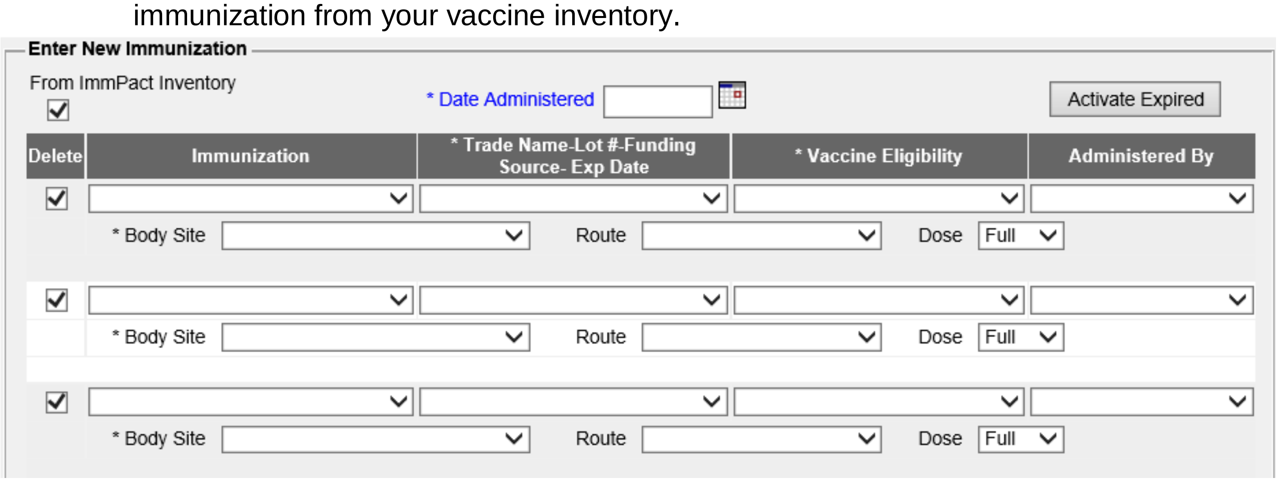
Print Record: Clicking this button will display the patient's immunization information without the top or side ImmPact menus. To print this page, Click the printer icon on your browser's tool bar or click File, Print and click OK. Click the browser's Back button to return to the Patient Immunization Information page.

Print Confidential Record: Clicking on this button will display the patient's immunization information without top or side ImmPact menus and without confidential patient information. To print this window, Click the printer icon on your browser or click File, Print, and Click OK. Click your browser's Back button to return to the Patient Immunization Information page.

ENTERING IMMUNIZATIONS

To add new immunizations:

1. To enter immunizations using the **Add Selected** button in the bottom right hand corner of the page, click the boxes of the appropriate immunizations under the Vaccines Recommended section and click the Add Selected button.
2. To enter immunizations without using the Add Selected button, click the **Add New Imms** button to display the Enter New Immunization page.
3. To add immunizations from ImmPact Inventory, click the check box **From ImmPact Inventory (default)**. This will deduct the immunization from your vaccine inventory.

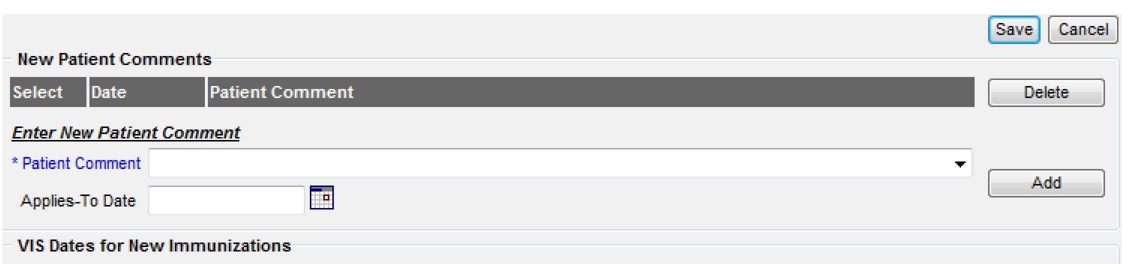


- Click a date for the Date Administered field using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. drop-down
- You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Super User of ImmPact for your organization. Refer to “Managing Clinicians” (Chapter 8).
- Delete box: click when removing an immunization.
- Immunization: click from the drop-down list. This will uncheck the Remove box.
- Trade Name-Lot #-Funding Source Exp Date: click or enter the appropriate Trade-Name-Lot #-Funding Source Exp Date. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.) Vaccine Eligibility: click the appropriate vaccine eligibility for this patient’s immunization. The vaccine eligibility drop-down list will display according to organization type.
- Body Site: click the appropriate body site for the immunization.
- Route: click the appropriate route for the immunization.
- Dose: click the appropriate dose for the immunization. The dose will default to Full.

Note: Entering a date in the Date Administered field and selecting the **Activate Expired** button will populate the Immunization and Trade Name dropdowns with inventory (with inventory on hand) that was not expired as of the Date Administered.

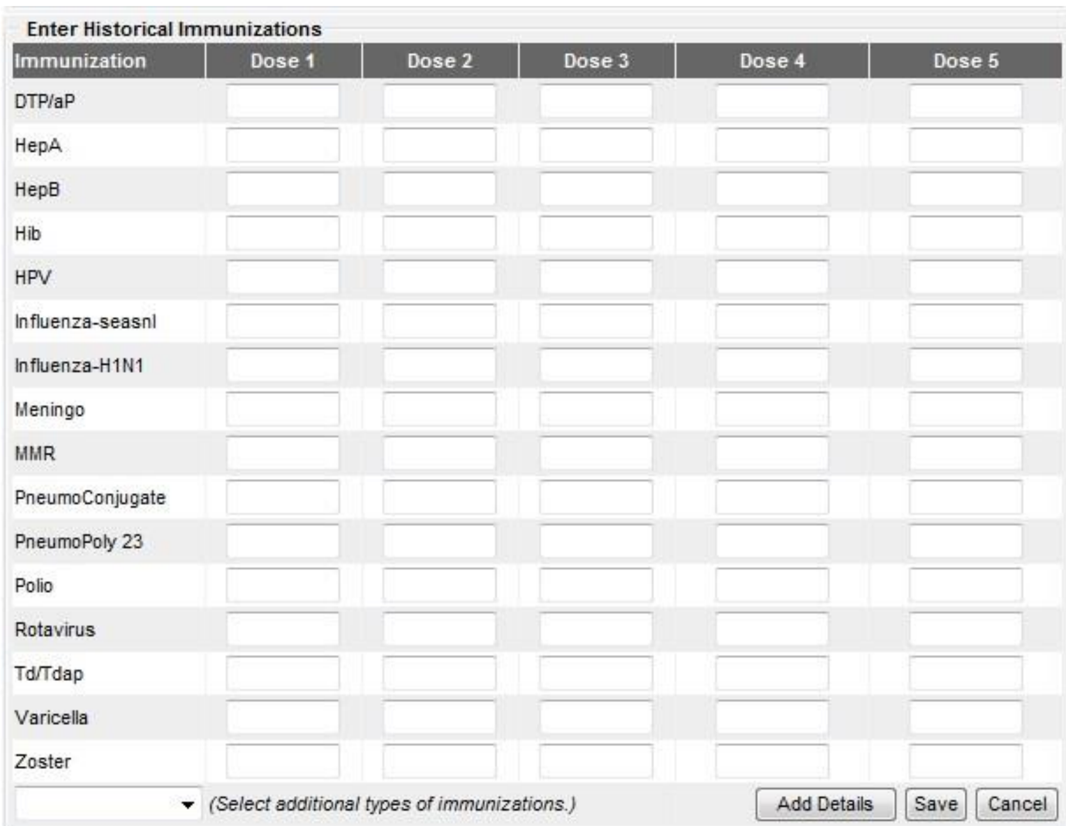
Repeat these steps for each new immunization you are entering.

- New Patient Comments: If necessary, select the appropriate comment from the drop-down list. Add an “Applies-To Date” by using the MM/DD/YYYY format or use the pop-up calendar by clicking the calendar icon to the right of the field. Click the Add button to add patient comment to the record. For more information on Patient Comments, see Managing Patients, Chapter 10.
- Click the Save button to save your immunization entry.



To Add Historical Immunizations:

1. Click the **Add Historical Imms** button to display the Enter Historical Immunizations page.
2. Enter Doses 1 – 5 for immunizations being historically recorded by using the MM/DD/YYYY format. For those immunizations not being recorded, leave the box blank.



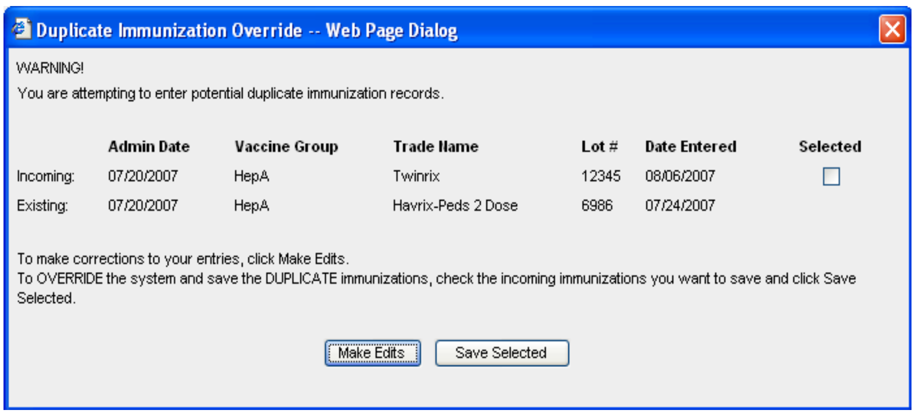
3. Click the **Add Details** button to enter the Trade Name, Lot Number, Provider Org, and Source of Immunization.
4. Click the **Save** button to save your immunization entry.

Duplicate Immunizations

ImmPact does not allow duplicate immunizations to be entered for a patient. If you attempt to enter an immunization for a patient given within 14 days before or after an existing immunization within the same Vaccine Group, you will receive the message, “Possible duplicate immunizations exist. Modify or delete your entries.” ImmPact will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunization override warning:

- In the Duplicate Immunization Override warning dialog box, review all immunizations to determine whether there are any duplicates.
- If the immunization(s) you entered need to be removed or edited, click “Make Edits”.
- At the Enter New Immunization or Enter Historical Immunizations page, make changes or remove immunizations as needed. Click the **OK** button.



- If an Immunization listed in the warning dialog box is not a duplicate, select the checkbox next to the immunization to enter it as a separate vaccine event and click the Save Selected button.

Applying a Prerequisite Override to a Patient's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a patient reaches a certain age. A prerequisite override is not automatically applied to an individual patient's immunization record. To apply a prerequisite override to an immunization:

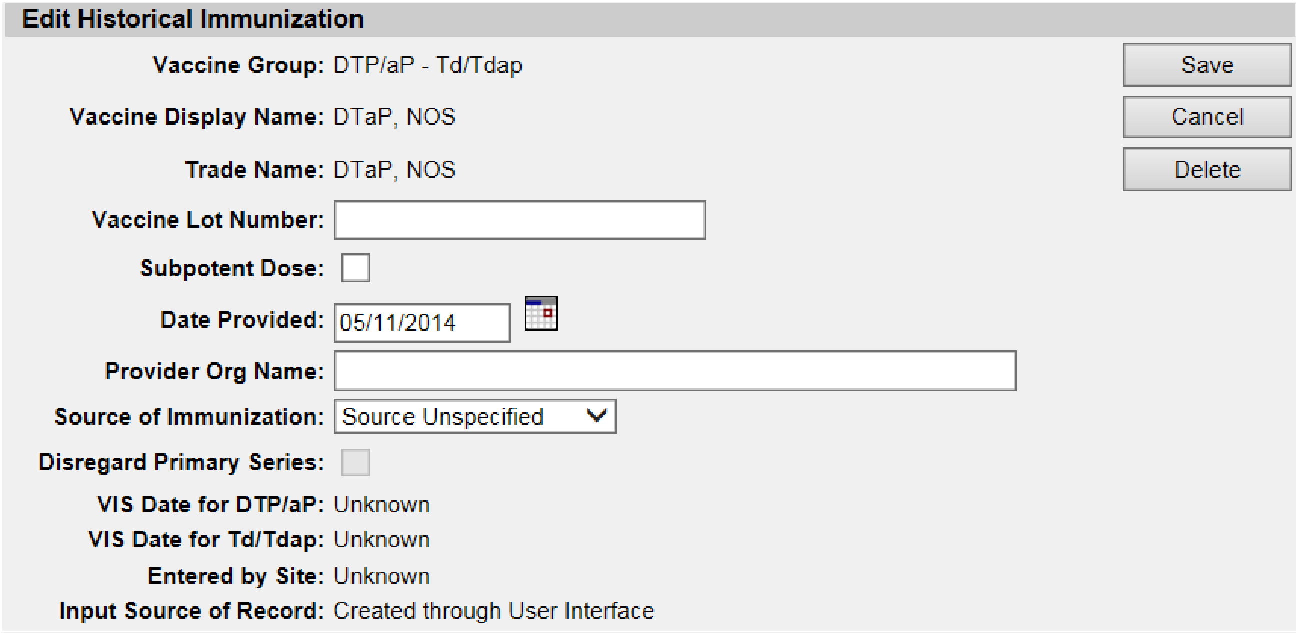
1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the Editing Owned Immunization from the Inventory section of this chapter.
3. In the field marked Disregard Primary Series, click Yes. This field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the patient is greater than or equal to the override age) meet those of the prerequisite override.
4. Click **Save**.

EDITING IMMUNIZATIONS

Editing or Deleting Historical Immunizations

To edit or delete a historical immunization:

1. On the Immunization Record table, select the historical vaccine record you wish to edit by clicking the vaccine's notepad icon in the "Edit" column.



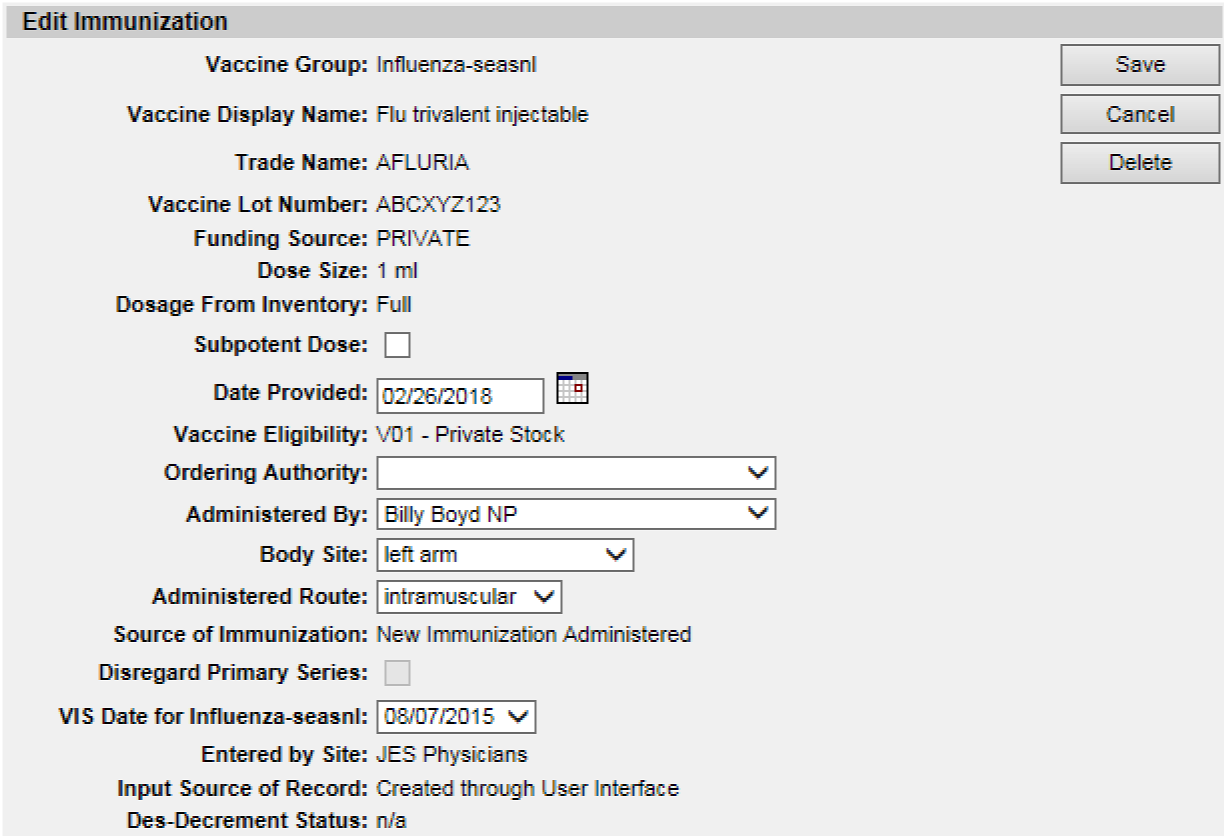
2. On the Edit Historical Immunization page, you may edit information for the Vaccine Lot Number, Subpotent Dose, Date Provided, Provider Organization Name, Source of Immunization fields; you many also select the box for Disregard Primary Series.
3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. To delete the historical immunization, click the **Delete** button.
5. Click the **Save** button.

Editing Owned Immunizations

An immunization that is not historical is one that was given out of an organization's inventory or submitted via electronic data exchange as administered. You will not be able to edit non-historical immunizations that are owned by another organization.

To edit an immunization record that is an owned immunization, administered by your organization:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking the vaccine's notepad icon in the Edit column.



2. To indicate a partial dosage, check the **Subpotent Dose** checkbox. For example, check this box if a partial dosage was administered because the needle broke or was removed too soon.
3. Update information in the Date Provided, Vaccine Eligibility, Ordering Authority, Administered By, Body Site and/or Administered Route fields on the Edit Immunization page.
4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, click an alternate date from the drop-down list.
5. To record a reaction to the immunization, check the box next to the applicable reaction.
6. Click the **Save** button.

Deleting Owned Immunizations

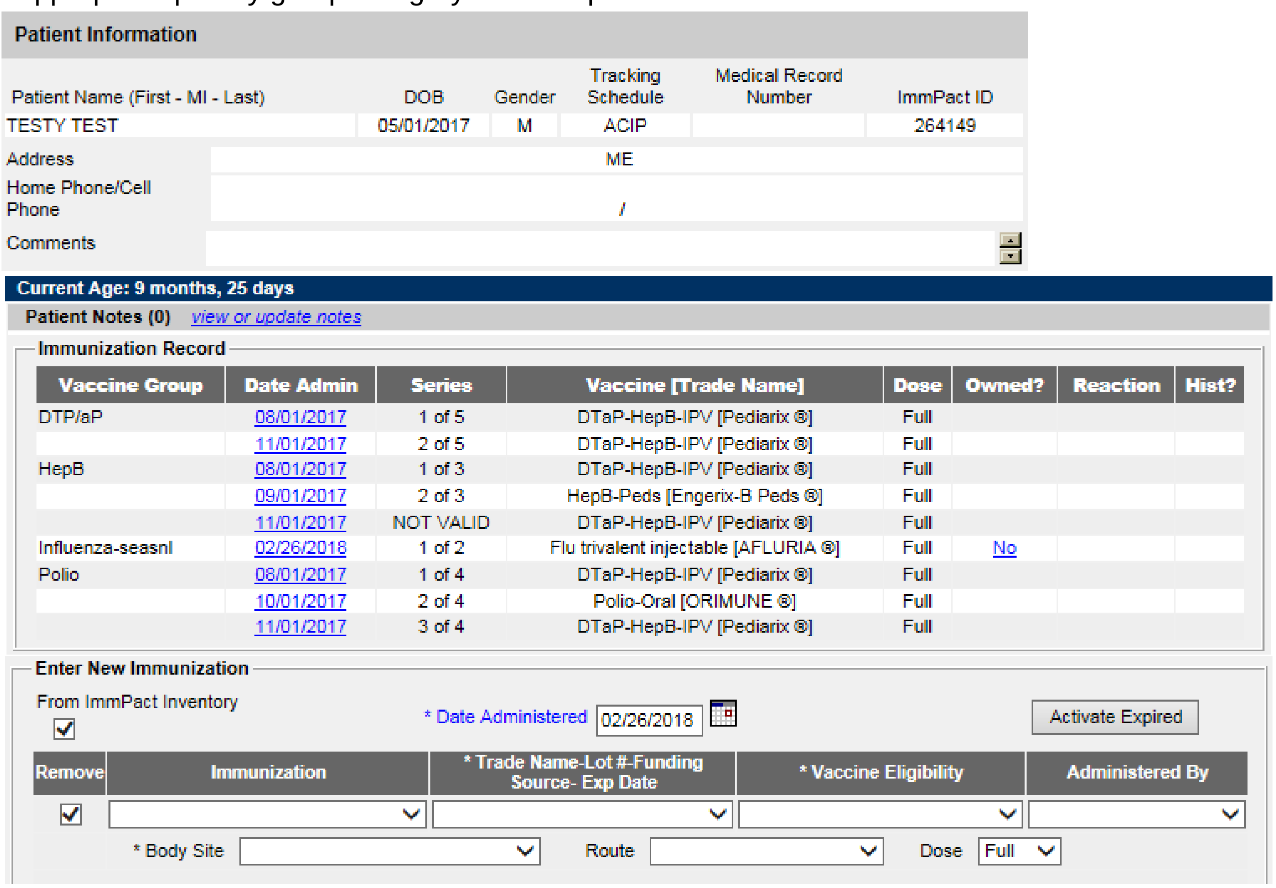
Note that you will not be able to delete non-historical immunizations that are owned by another organization.

1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notebook icon in the Edit column.
2. At the Edit Immunization page, click the **Delete** button.
3. Click the **OK** button in the confirmation box.

COUNTERMEASURE AND RESPONSE ADMINISTRATION (CRA)

In the event of a public health emergency, ImmPact may be used to track the administration of vaccine. In some cases, specific patient groups may be identified as being at higher risk than the general population and targeted to receive the vaccination first. These groups are called priority groups.

The CRA Event Information section is used to collect public health data during a pandemic event or preparedness exercise (such as the response event to a pandemic influenza outbreak.). If your organization is selected for an event, then the CRA Event Information section will be displayed on the Record Immunizations page. Based on candidate screening, click the appropriate priority group category for each patient.



Patient Information

Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Medical Record Number	ImmPact ID
TESTY TEST	05/01/2017	M	ACIP		264149

Address: ME

Home Phone/Cell Phone: /

Comments

Current Age: 9 months, 25 days

Patient Notes (0) *view or update notes*

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?
DTP/aP	08/01/2017	1 of 5	DTaP-HepB-IPV [Pediarix ®]	Full			
	11/01/2017	2 of 5	DTaP-HepB-IPV [Pediarix ®]	Full			
HepB	08/01/2017	1 of 3	DTaP-HepB-IPV [Pediarix ®]	Full			
	09/01/2017	2 of 3	HepB-Peds [Engerix-B Peds ®]	Full			
	11/01/2017	NOT VALID	DTaP-HepB-IPV [Pediarix ®]	Full			
Influenza-seasnl	02/26/2018	1 of 2	Flu trivalent injectable [AFLURIA ®]	Full	No		
Polio	08/01/2017	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full			
	10/01/2017	2 of 4	Polio-Oral [ORIMUNE ®]	Full			
	11/01/2017	3 of 4	DTaP-HepB-IPV [Pediarix ®]	Full			

Enter New Immunization

From ImmPact Inventory

* Date Administered 02/26/2018

Activate Expired

Remove	Immunization	* Trade Name-Lot #-Funding Source- Exp Date	* Vaccine Eligibility	Administered By

* Body Site | Route | Dose Full

CHAPTER 12: COLD CHAIN MANAGEMENT

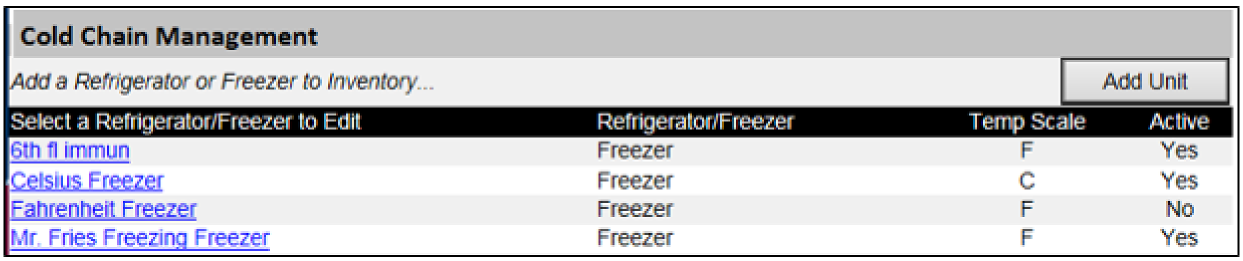
In this chapter:

Managing Cold Chain Units

Each organization, clinic, lab or office will use refrigerator and/or freezer type units as part of their cold storage program. This function allows an authorized user to Add or Edit their Refrigerator or Freezer units to support temperature monitoring.

Adding New Units

1. On the ImmPact Home page, click on **Manage Cold Chain** under the Maintenance section of the menu panel. The Cold Chain Management screen will display.
2. Press the [Add Unit] button.

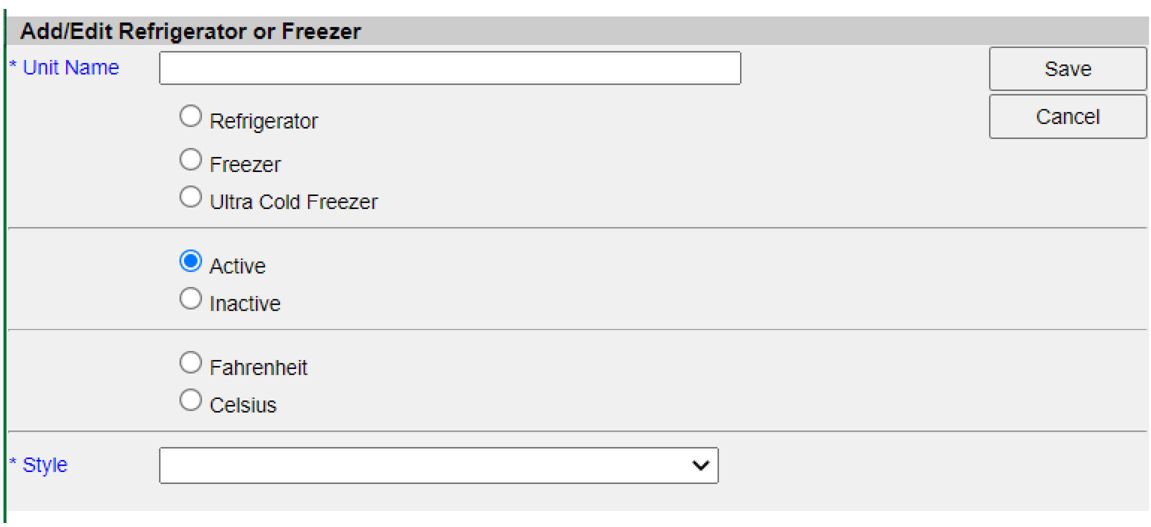


Cold Chain Management

Add a Refrigerator or Freezer to Inventory... [Add Unit]

Select a Refrigerator/Freezer to Edit	Refrigerator/Freezer	Temp Scale	Active
6th fl immun	Freezer	F	Yes
Celsius Freezer	Freezer	C	Yes
Fahrenheit Freezer	Freezer	F	No
Mr. Fries Freezing Freezer	Freezer	F	Yes

3. The Add/Edit Refrigerator or Freezer Screen will display.



4. Enter appliance name in the Unit Name field
5. Select appliance type – Refrigerator, Freezer or Ultra Cold Freezer
6. Ensure that the Active button is selected. This is the default when new units are added.
7. Select the temperature scale for the unit – Fahrenheit or Celsius
8. Select a Unit Style from the Style drop-down.

9. Press Save to add new appliance unit to existing appliance list.

Editing an Existing Unit

1. On the ImmPact Home page, click on **Manage Cold Chain** under the Maintenance section of the menu panel. The Cold Chain Management screen will display.
2. Select the Unit Name hyperlink under the 'Select a Refrigerator/Freezer to Edit' column
3. Add/Edit Refrigerator or Freezer screen will display.
4. Edit appropriate field(s):
    - Unit Name
    - Appliance Status: (Active or Inactive)
    - Temperature scale (Fahrenheit or Celsius)
5. Press Save to save changes made to existing unit.
6. Or Press Cancel to return to the Cold Chain Management screen without saving changes.

Removing an Existing Unit

An existing refrigerator or freezer unit cannot be removed (deleted) due to its association with historical temperature log recording data. If the appliance is being retired, sold, or moved to another location the user must:

1. Follow the steps to Editing an Existing Unit
2. Select the Inactive button as the Appliance Status
3. Press Save to save changes made to existing unit

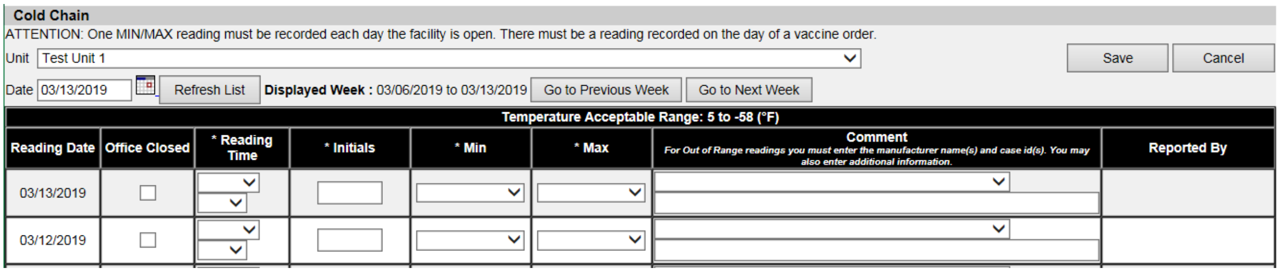
Note: The unit will still remain on the Cold Chain Management list with an Active Status of 'No.

COLD CHAIN TEMPERATURE RECORDING

The Maine Center of Disease Control (MCDC) Immunization Program requires providers enrolled in the VFC Program to use the ImmPact Cold Chain screen to record daily temperatures for their storage units (refrigerators and freezers) containing VFC vaccines. Reporting storage unit temperatures that hold only "private" vaccine is not required. Temperatures should be entered directly into the ImmPact Cold Chain screen daily.

To Record a Cold Chain Temperature reading in ImmPact:

1. Click on **Record Cold Chain** under the Inventory section of the menu panel. The Cold Chain screen displays.



2. Select the appropriate refrigerator or freezer from the Unit dropdown list.
3. By default, the log will display the past 7 days. To view a different date range, change it by typing a new date in the Date field or by using the calendar icon and then click Refresh List. The Go to Previous Week and Go to Next Week buttons can also be used to navigate to a different date.
4. To record a temperature type (Min and Max), first select the time of reading from the *Reading Time dropdown list, next to the appropriate date. For days that your office was closed, click the “Office Closed” checkbox.

   Definitions of temperature types:

   Min (required): The coldest the cooler unit has been since the minimum/maximum thermometer was reset.

   Max (required): The warmest the cooler unit has been since the minimum/maximum thermometer was reset.

5. Select the temperature from the *Min and *Max dropdown lists. If the refrigerator or freezer’s temperature is not on the dropdown list, select the “Out of Range” option.
   a. ***Note:*** If your temperature reading is Out of Range, you must manually enter the temperature in the Out of Range field that appears below the dropdown list.
   b. If an Out of Range temperature is entered, a comment must be selected from the first dropdown in the Comment column and the manufacturer name(s) and case id(s) must be entered in the open comment field below the dropdown.
   c. If an Out of Range temperature is recorded, your organization will be suspended from initiating and receiving transfers, as well as creating a new vaccine order for seven days from the Out of Range temperature.

6. Click Save to save temperature recording(s).

Edit Existing Cold Chain Temperature Reading

1. Repeat steps 1-3 from **Record a Cold Chain Temperature Reading**.

   a. ***Note:*** You will only be able to edit in-range temperatures. Any Out of Range temperatures will be locked from editing.

2. Make necessary changes to editable fields.

3. Click 

to save your changes.

Notes: Ensure that you enter your Cold Chain Temperature recordings into ImmPact promptly. Organizations cannot transfer vaccine between themselves without an up-to-date (same day of transfer) Cold Chain Temperature log. Also, an organization must have a temperature recording on the same day an order for additional vaccine is created.

CHAPTER 13: CLINIC EVENTS

In this chapter:

CLINIC EVENTS

ImmPact allows a provider organization to set up a vaccination event in which other provider organizations can participate, using the primary organization's inventory to administer vaccinations to their patients. This type of event is referred to in ImmPact as a **Clinic Event**.

Creating a Clinic Event

For an organization to create a clinic event, take the following steps:

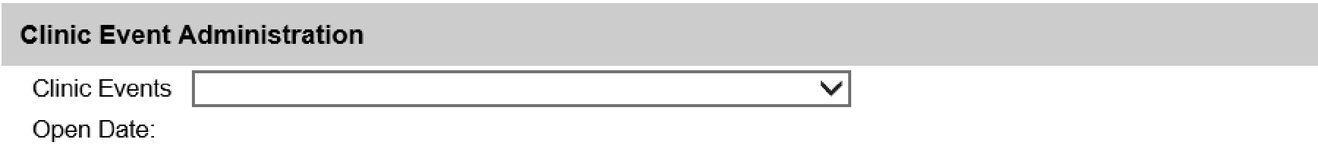
1. Click **Clinic Event Management** under the Clinic Event section of the menu panel.
2. Click the **Add New** button. (Note: User who wish to edit an existing Clinic Event can just click on the name of the Clinic Event on this screen, which is a hyperlink.
3. Enter a Name and a Type for the new Clinic Event (these are required).
    a. Selecting 'Other' will display an open text field, this field is not required
4. Use **Add Vaccine Lots** section to designate specific vaccine inventory for use in the Clinic Event (designated lots will appear in the **List of Available Lots** section).
5. Use **Add Participating Organizations** section to add provider organizations who can use designated vaccine lots in the Clinic Event.
6. Click Save
7. User can also close or re-open the Clinic Event from this screen.
8. Users can view all Clinic event inventory transactions on the Show Transactions page.

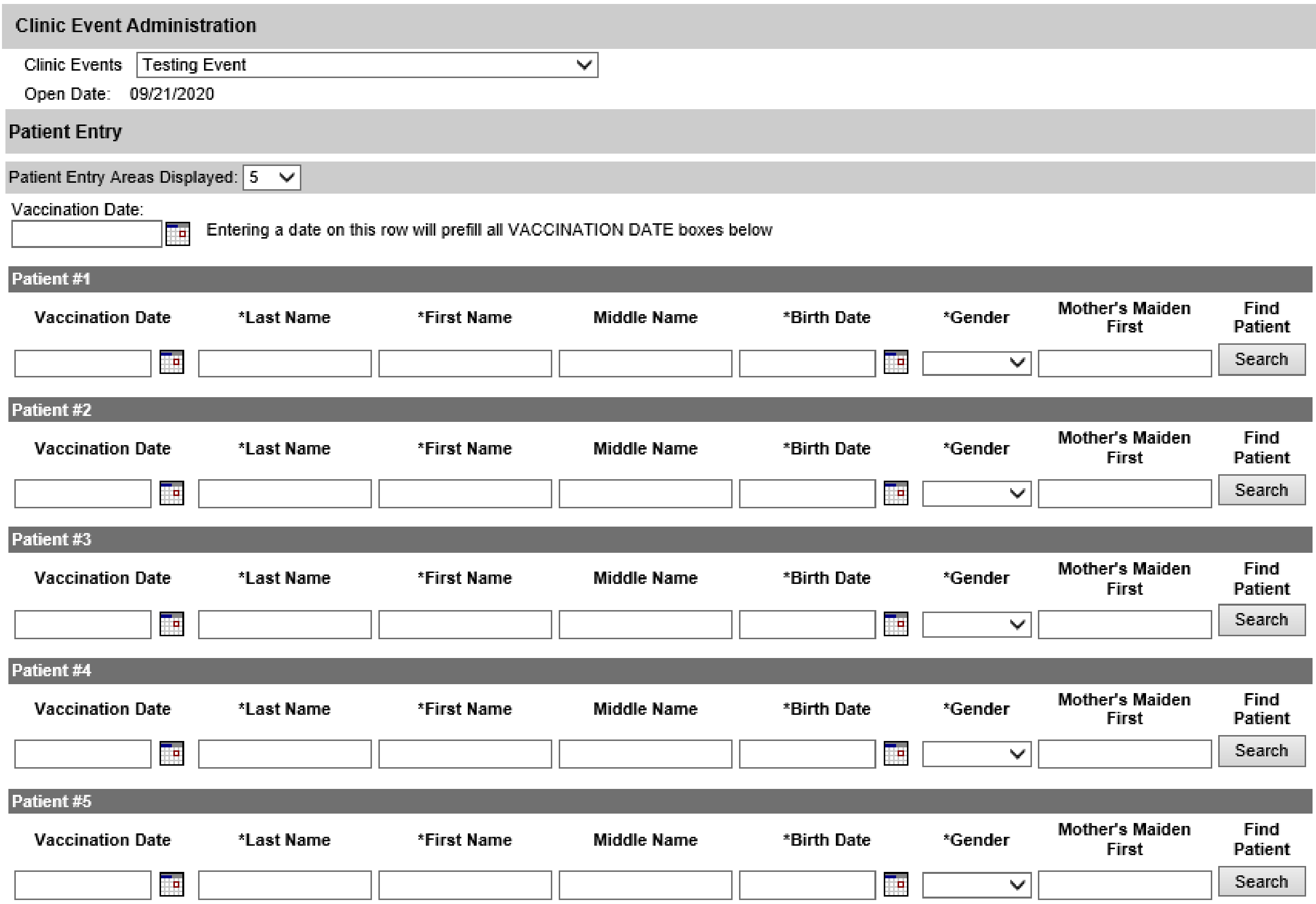
Administering a Clinic Event

For an organization to administer vaccines from a clinic event, take the following steps:

1. Click **Clinic Event Administration** under the Clinic Event section of the menu panel.
2. Select a Clinic Event from the Clinic Event drop-down menu to display the patient entry rows.
3. Users can either search for an existing patient or Add a new patient in the **Patient Entry** section.
4. Once a patient has been populated, the immunization administration fields will display. All fields, except Administered By, are required to save the immunization.
5. The user may save one patient row at a time or use the 'Save All' button to save all of the patient entry rows displayed at a time.

6. Users may view all Doses Administered for their organization using the Doses Administered Report





CHAPTER 14: FORMS AND REPORTS

In this chapter:

PATIENT LEVEL REPORTS

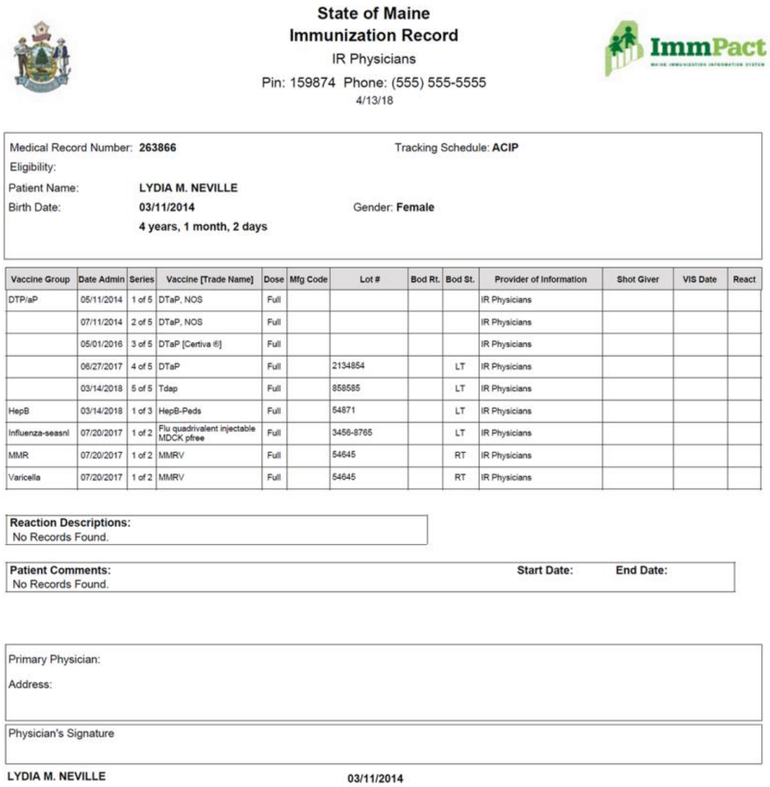
For all patients in ImmPact, you may generate the following reports from the Patient Reports Screen:

- Immunization History Report
- Immunizations Needed/Routing Slip

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's immunization history. This report will typically be used as an official school record. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click **Immunization History Report**, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.



State of Maine
Immunization Record
IR Physicians
Pin: 159874 Phone: (555) 555-5555
4/13/18

Medical Record Number: 263866 Tracking Schedule: ACIP
Eligibility:
Patient Name: LYDIA M. NEVILLE
Birth Date: 03/11/2014 Gender: Female
4 years, 1 month, 2 days

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	Shot Giver	VIS Date	React
DTP/aP	05/11/2014	1 of 5	DTaP, NOS	Full					IR Physicians			
	07/11/2014	2 of 5	DTaP, NOS	Full					IR Physicians			
	05/01/2016	3 of 5	DTaP [Certiva ®]	Full					IR Physicians			
	06/27/2017	4 of 5	DTaP	Full		2134854		LT	IR Physicians			
	03/14/2018	5 of 5	Tdap	Full		858585		LT	IR Physicians			
HepB	03/14/2018	1 of 3	HepB-Peds	Full		54871		LT	IR Physicians			
Influenza-seasnl	07/20/2017	1 of 2	Flu quadrivalent injectable MDCK pfree	Full		3456-8765		LT	IR Physicians			
MMR	07/20/2017	1 of 2	MMRV	Full		54645		RT	IR Physicians			
Varicella	07/20/2017	1 of 2	MMRV	Full		54645		RT	IR Physicians			

Reaction Descriptions:
No Records Found.

Patient Comments: **Start Date:** **End Date:**
No Records Found.

Primary Physician:
Address:

Physician's Signature

LYDIA M. NEVILLE 03/11/2014

To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

4. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Immunizations Needed/Routing Slip Report

The Immunizations Needed/Routing Slip report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps: From a patient's Manage Patient screen or Manage Immunizations screen, click **Reports**.

1. At the Reports Available for this Patient section, click **Immunizations Needed/Routing Slip**, which is a hyperlink.
2. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

04/13/2018 **ImmPact** Page 1

Immunizations Needed /Routing Slip

Medical Record Number: 263866 **Tracking Schedule:**ACIP
Patient Name (L, F, M): NEVILLE, LYDIA, M.
Birth Date: 03/11/2014
Age: 4 years, 1 month, 2 days
Gender: F **Ethnicity:** Not Hispanic or Latino

Race:
- [ ] American Indian or Alaska Native
- [ ] Asian
- [ ] Native Hawaiian or Other Pacific Islander
- [ ] Black or African-American
- [x] White
- [ ] Other

Patient Comments: **From Date:** **To Date:**

Immunization Record				
Vaccine Group	**Date Admin**	**Series**	**Vaccine [Trade Name]**	**Dose**
DTP/aP	05/11/2014	1 of 5	DTaP, NOS	Full
DTP/aP	07/11/2014	2 of 5	DTaP, NOS	Full
DTP/aP	05/01/2016	3 of 5	DTaP	Full
DTP/aP	06/27/2017	4 of 5	DTaP	Full
DTP/aP	03/14/2018	5 of 5	Tdap	Full
HepB	03/14/2018	1 of 3	HepB-Peds	Full
Influenza-seasnl	07/20/2017	1 of 2	Flu quadrivalent injectable MDCK pfree	Full
MMR	07/20/2017	1 of 2	MMRV	Full
Varicella	07/20/2017	1 of 2	MMRV	Full

Immunizations Due Record			
Vaccine	**Date Needed**	**Trade Name/ Lt #/Funding Source**	**Give These**
HepA	03/11/2015		
HepB	04/11/2018		
Hib	06/11/2015		
Influenza-seasnl	08/17/2017		
MMR	03/11/2018		
PneumoConjugate	03/10/2016		
Polio	05/11/2014		
Varicella	03/11/2018		

3. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
4. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

AD HOC REPORTS

The Ad Hoc reports function in ImmPact allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations. The table below defines terms used in Ad Hoc reports.

Items to filter on	Patient Factors
American Indian or Alaska Native	Whether the patient is an American Indian or Alaska Native
Area Code	Area Code in which the patient lives

Items to filter on	**Patient Factors**
Asian	Whether the patient is Asian
Birth County	County of birth
Birth Date	Date of birth
Black or African-American	Whether the patient is Black or African-American
City	Current city in which the patient resides
Comment	Any comments associated with the patient record
Consent Indicator	
County of Residence	Current county in which the patient resides
Ethnicity	Ethnicity of patient
Gender	Gender of patient
Has 2 or more immunizations	Whether the patient has two or more immunizations
Language preferences	Language preferred by the patient
Mother's HBsAg Status	
Native Hawaiian or Other Pacific Islander	Whether the patient is Native Hawaiian or an Other Pacific Islander
Other Race	Whether the patient is of a race not specified by the system, leading them to choose Other
Patient ID	The Patient ID within ImmPact
Phone number	Current phone number
Primary Address Indicator	Whether the patient has a primary address in ImmPact
Primary Care physician	Patient's primary care physician
Relationship to patient	The Responsible Person's relationship to patient
School	Current school the patient attends
State	Current state of residence
White	Whether the patient is White/Caucasian
Zip code	Zip Code in which the patient current resides

Immunization Factors	
Administering clinician	Clinician who administered the immunization
Clinic site	Clinic site at which the immunization was administered
Sub potent	Will filter by sub potent immunizations that were given.
Display Inadvertent Vaccine Group	
From Inventory	Whether the immunization was from inventory in ImmPact
Trade Name	Vaccine's trade name
Vaccination date	Date on which the immunization was administered
Vaccine	Vaccine administered
Vaccine Eligibility	Whether the immunization was VFC eligible
Vaccine Lot Other Inv	Vaccine from non-inventoried lot
Vaccine Group	Group in which the vaccine is labeled
Vaccine Lot	The log from which the vaccine was aliquoted
Valid immunization	Whether the immunization is valid
BEFORE	Used for dates

Comparisons	
BEFORE	Used for dates
EQUALS	Same in comparison
NOT EQUAL TO	Not the same in comparison
AFTER	Used for dates
BETWEEN	Used for dates
IS	Exact equivalent
IS NOT	Not the equivalent
Edit	Edit an applied filter
Remove	Remove an applied filter
And/Or	Changes the operator between 'And' and 'Or' depending upon which is initially selected. Requires at least two filters to be applied.
Group	Groups filtered sections together in the report
Ungroup	Removes grouped filtered sections

[redacted]

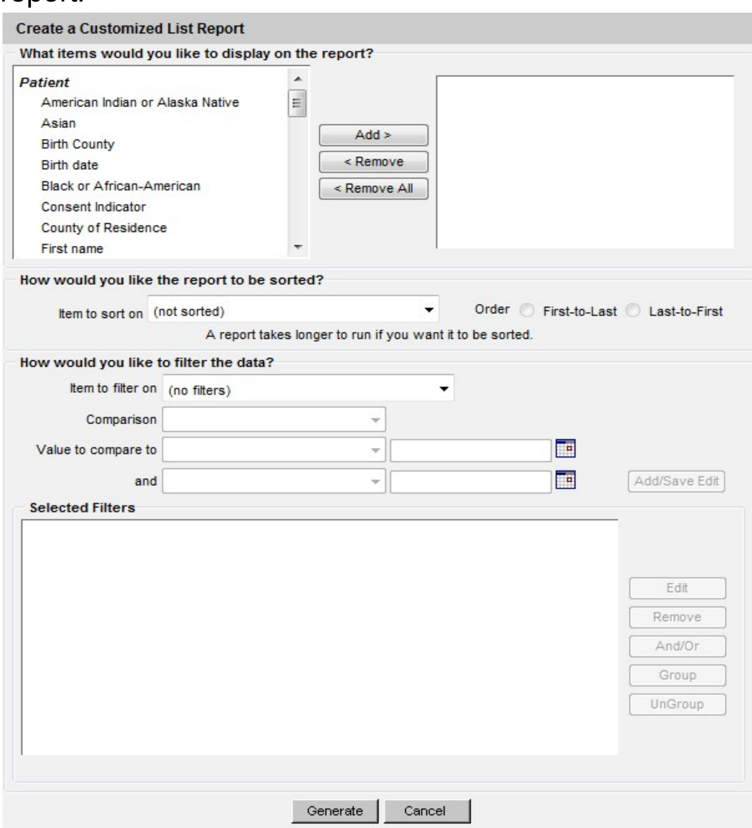
Notes: Patients whose information is added or changed on the day the report is run will not appear in the results until at most 30 minutes after the data was entered.

Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status in the organization information section of the patient's record.

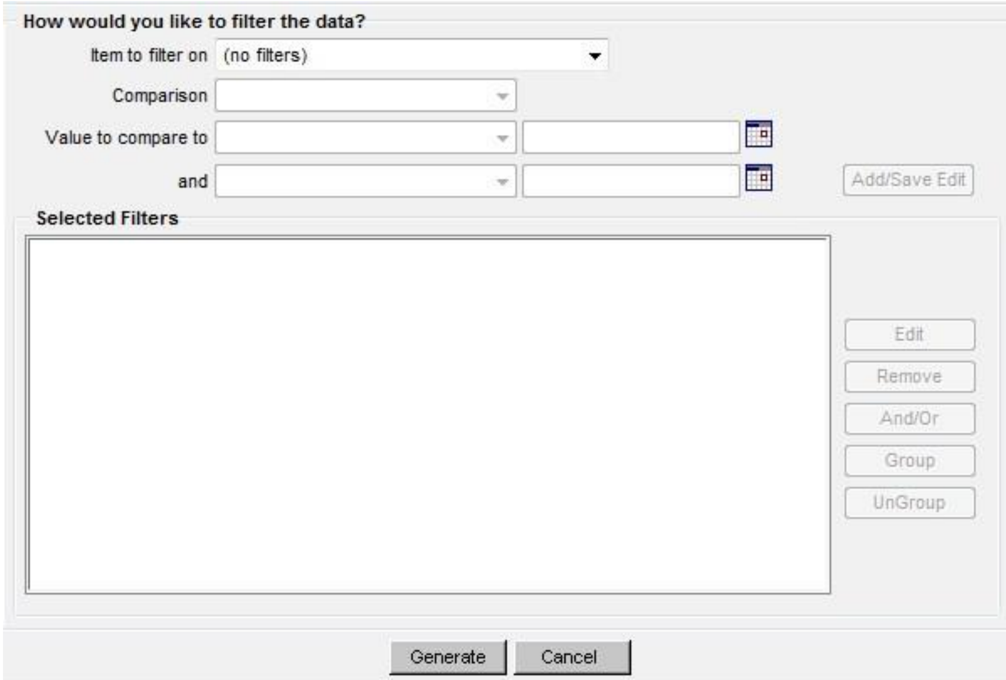
Ad Hoc List Reports

To produce a list of information about selected patients:

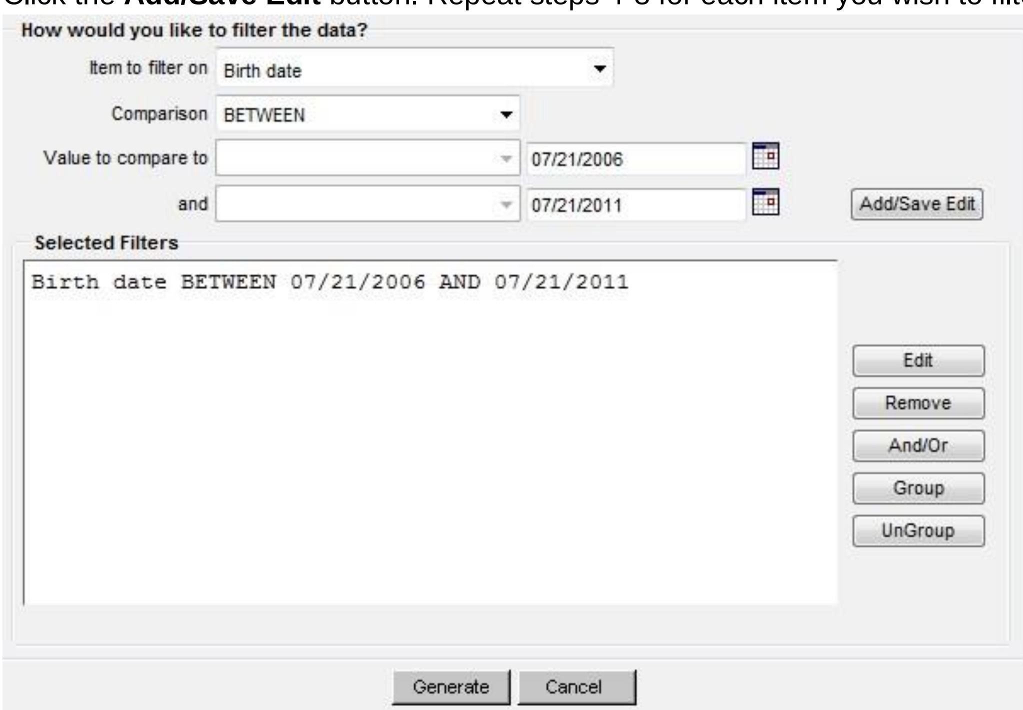
1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.



3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.



4. Under Item to filter on, select an item that you would like to add as a filter using the drop-down list. For example, Birth Date Range could be an item used as a filter.
5. Filters in ImmPact are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop-down list that best describes the type of comparison you wish to make; for example, Between. =
6. Under Value to compare to, either choose a value from the drop-down list in the left field and/or enter a date in the right field.
7. Under And, select another value from the drop-down list in the left field or enter the ending date in the right field, if applicable.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.



9. When finished adding filter items:

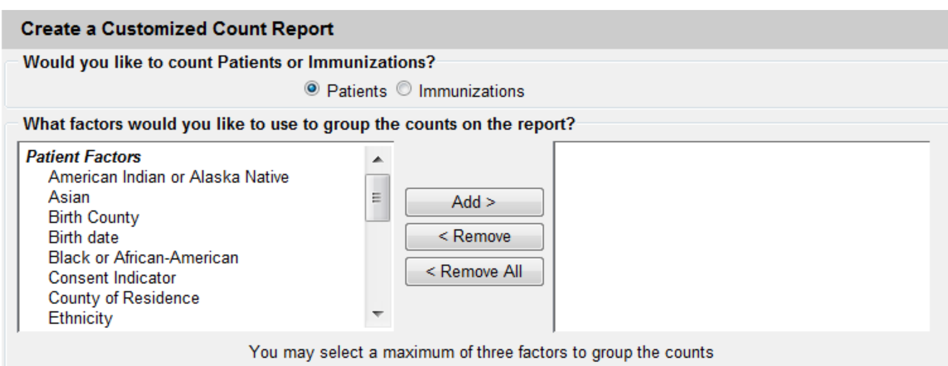
a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button. Alternatively, can also be switched to AND by following the same process.
b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report, which is indicated by wrapping the lines in parenthesis.
c. Highlight a grouped statement and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.

10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

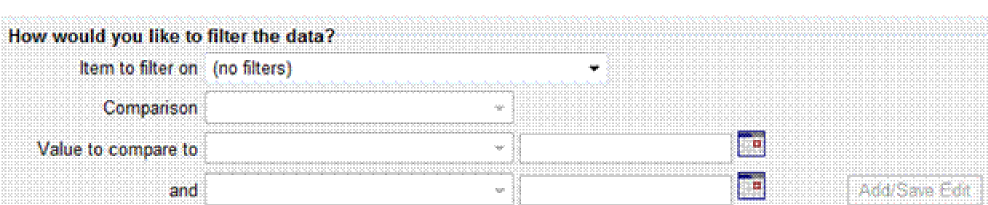
Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.



3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.



4. Under Item to filter on select an item that you would like to add as a filter using the drop-down list. For example, Birth Date Range could be an item used as a filter.
5. Under Comparison, select a word from the drop-down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.
6. Under Value to compare to, either choose a value from the drop-down list in the left field or enter a beginning date in the right field.
7. Under and, select another value from the drop-down list in the left field or enter the ending date in the right field, if applicable.
8. Click on **Add/Save**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
    a. Group them together by highlighting two filter statements and click Group. This will add parenthesis to indicate that the statements are now grouped.
    b. Change AND to OR by highlighting 'AND' and clicking the ***And/Or*** button. OR can also be switched to AND by following the same process.
    c. Highlight a grouped statement and click on ***Ungroup*** to ungroup it.
    d. Highlight a statement and click on ***Remove*** to remove it from the selected filters.
    e. Highlight a statement and click on ***Edit*** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on ***Add/Save***
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

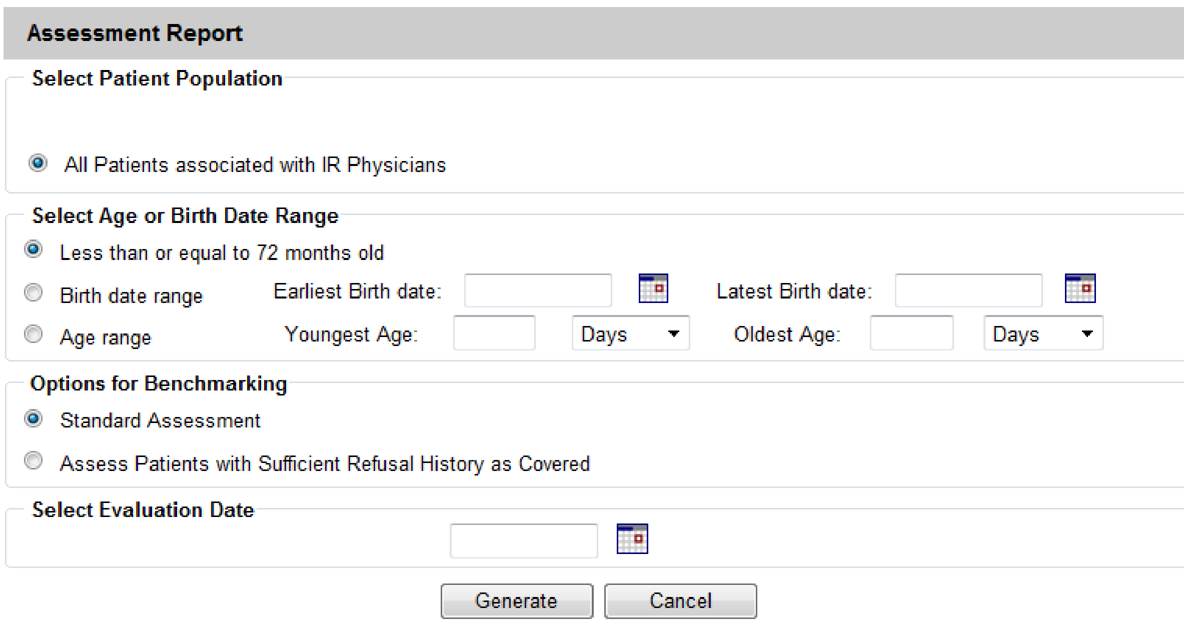
1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.
2. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.
4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.

Note: Ad hoc reports are retained for 72 hours per organization. ImmPact will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.

ASSESSMENT REPORTS

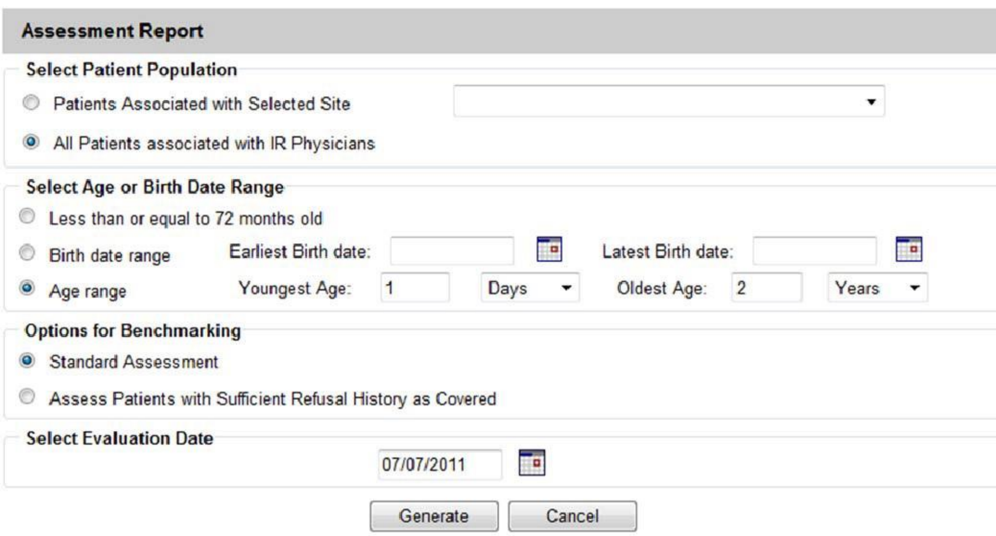
The Assessment Report feature in ImmPact provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

1. Click **Assessment Report** under the Reports section of the menu panel.

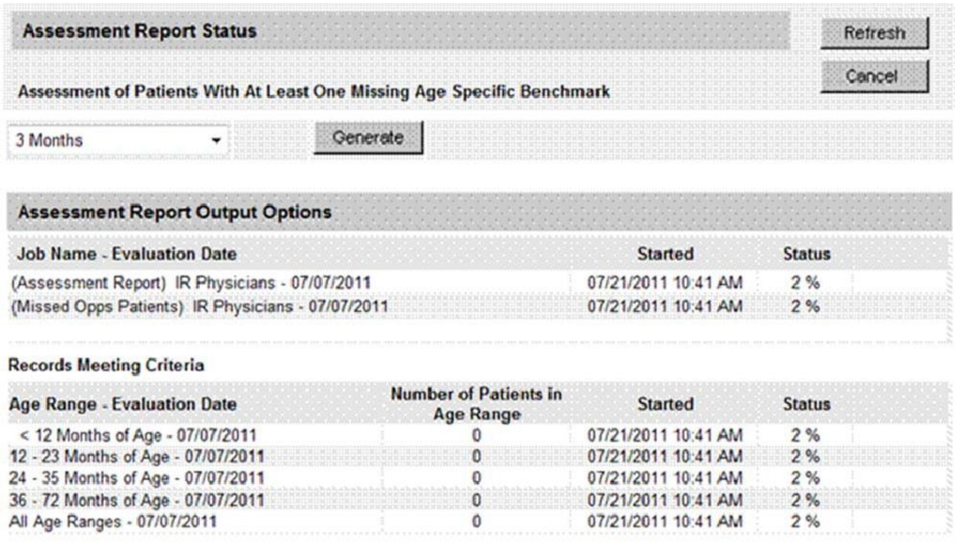


2. Select the patient population to be assessed by clicking one of the following:
3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:
    a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.

b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop-down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop-down list to choose days, months, or years. You cannot search for patients older than 72 months.
d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.
e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.



5. Click **Generate.**
6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.



7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.
8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:
9. Select an age from the drop-down list provided and click on Generate (to the right of the age drop down list). Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop-down list and clicking **Generate**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.
10. Click the underlined job name.
11. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.
12. The assessment report will be called: (Assessment Report) <Organization Name> - <Date>.
13. A report listing all patients who have missed a vaccination opportunity will have a job name of: *(*Missed Opps Patients) <Organization Name>-<Date>.
14. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.

15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.
16. Click **OK** in the Print Dialog box
17. To return to the Assessment Report Status screen, click the Back button in the browser.

Note: Patients with Refusals
If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

Understanding the Assessment Report

The following is a brief overview of the data that is returned on each table within the assessment report.

Table 1

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	50	0	50
24 - 35 Months of Age	51	0	51
12 -23 Months of Age	54	0	54
< 12 Months of Age	46	0	46
Total	201	0	201

Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected Patients within the age group that are included in this report. This is determined by the age range chosen when generating the report.

Inactive: This column displays the count of selected patients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Patients, for information on marking patients as inactive

Records Meeting Criteria: This column displays the count of selected patients within the age group who are Active in your organization.

Table 2

Immunization Status		
Age(months)	Up-to-Date [1-4] (UTD)	Late [1-4]
36 - 72 Months of Age		
72	82.0%	82.0%
24	88.0%	88.0%
12	92.0%	98.0%
7	92.0%	98.0%
24 - 35 Months of Age		
24	80.4%	90.2%
12	78.4%	94.1%
7	76.5%	94.1%
12 - 23 Months of Age		
12	90.7%	92.6%
7	83.3%	92.6%
< 12 Months of Age		
7	89.1%	89.1%

1) UTD by 7 months equals 3 DtaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals 5 DtaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio, 1 Varicella.
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

Age (Months): This column displays the age of the patient on the assessment date.

Up-to-Date: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a seven-month-old UP- TO-DATE patient who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.

Late UP-TO-DATE @ Assessment: This column displays the percent Of patients (out of the total number of active patients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Table 3

Age Specific Immunizations Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a patient should have by the age listed at the left to be determined UP-TO-DATE. This chart is used to create the Assessment of Patients Meeting Age-Specific Benchmarks table.

Table 4

Assessment of Patients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	183	184	187		178	40		201	17.4%
5 Months	180	182	180		175	42		201	17.9%
7 Months	175	184	189		181	42		201	19.4%
9 Months	179	184	190		181	42		201	19.4%
12 Months	136	143	148		141	42		155	25.2%
16 Months	103	93	137	118	97	19	116	149	.7%
19 Months	103	95	137	121	101	25	119	149	.7%
21 Months	127	123	137	131	105	39	128	147	4.1%
24 Months	89	90	92	95	95	42	94	101	40.6%
72 Months	46	45	47	44	45	0	49	50	.0%

UP-TO-DATE Age: This column shows the maximum age the patient has attained by the assessment date.

Vaccine Columns: These seven columns display the count of the patients who have met the vaccination criteria by the UP-TO-DATE age.

Total Meeting Age Criteria: This column gives a count of all the patients who are at least the age listed under UP-TO-

DATE Age. However, the 72 Months UP-TO-DATE Age category includes patients from 48 to 72 months of age.

% Coverage: This column displays the percentage of patients meeting all UP-TO-DATE criteria, out of a total of all patients at least the age listed under UP- TO-DATE Age.

Table 5

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	5	10.9%
1 Vaccine Needed	2	40.0%
2 Vaccines Needed	3	60.0%
3 Vaccines Needed	0	.0%
4 Vaccines Needed	0	.0%

The report breaks down the children who could have been brought up to date into three tables, ≤ 12 months, 24-36 months, and 60-72 months. This is an example of ≤ 12 months.

Column 1: In the first row of column one, the age range of patients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of patients is displayed.

Column 2: In the first row of column two, a count is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of patients for this age group who need additional vaccinations to be up-to-date.

Column 3: In the first row of column three, a percent is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of patients for this age group). Subsequent rows within this column display a percentage of patients for this age group who need additional vaccinations to be up-to-date.

Table 6

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age [1]	100.0%	36-72 mo. age group
		21.6%	24-35 mo. age group
		98.1%	12-23 mo. age group
Drop Off Rates	60-72	.0%	24 month status
	48-59	.0%	24 month status
	36-47		24 month status
	24-35 mo. age	.0%	24 month status
	12-23 mo. age	5.6%	12 month status

Late Start Rates: A patient who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of patients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of patients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Table 7

Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number [4]	Per Cent [5]
Patients Missing Birth Dose Of Hep	14	7.0%

#

#

The Hep B chart gives the number and percentage of patients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Patients evaluated are between six and 72 months old and have at least one immunization in ImmPact.

Table 8

Missed Opportunity Assessment					
Age Group on Evaluation Date	Total Patients in Age Group	Patients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
<12 months 7 month benchmark	6	5	83.3%	1	16.7%
12-23 months 12 month benchmark	20	16	80.0%	14	70.0%
24-35 months 24 month benchmark					
36-72 months 24 month benchmark					

Age Group on Evaluation Date: This column lists the age group of the selected patients and the immunization benchmark used for evaluation.

Total Patients in Age Group: This column gives the total number of patients within the age group listed in the first column.

Patients Not Up to Date: This column gives the count and percentage of patients who are not up to date for the benchmark listed in column one.

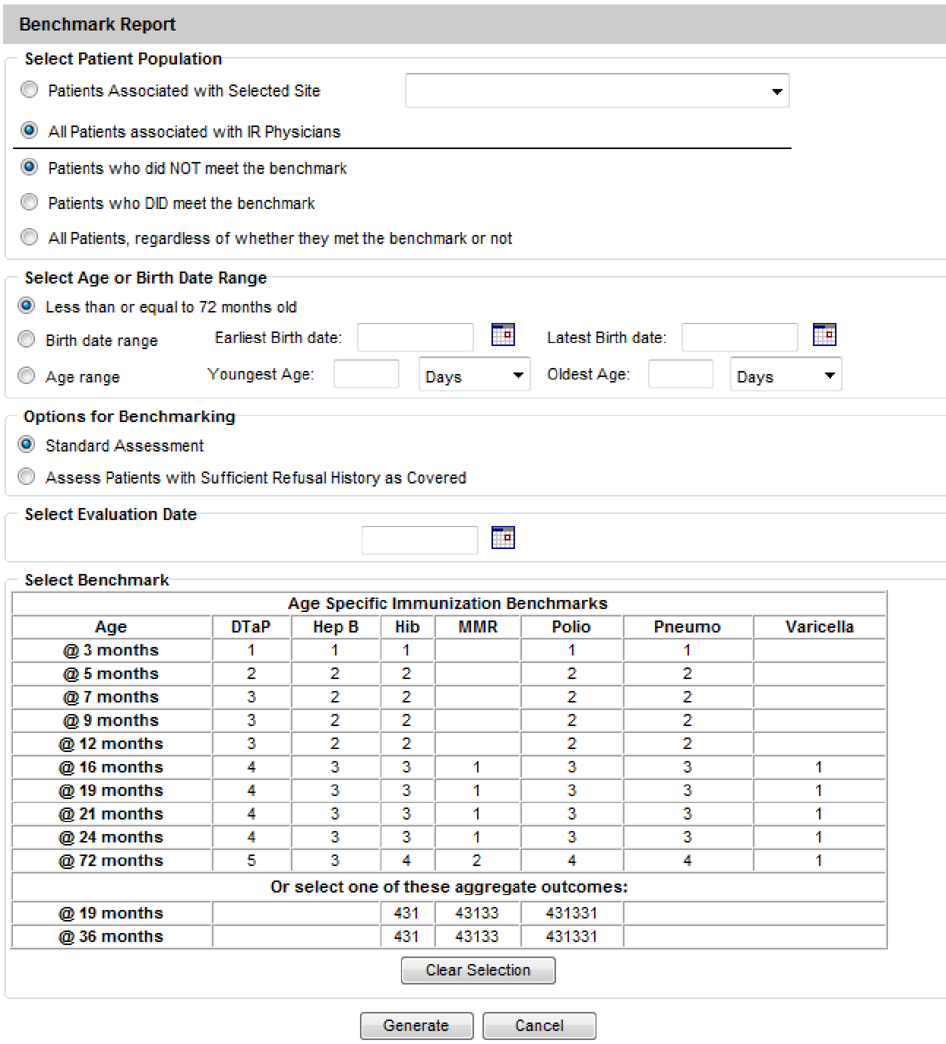
Missed Op on Last Visit: This column gives the count and percentage of patients who are ***not*** up to date ***and*** who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

The missed opportunities report lists all your organization's patients who have missed opportunities to be vaccinated. This report lists the patient's first and last names, birth date, and date of each missed opportunity by vaccine group.

Note: Missed Opportunities Assessment

Keep in mind, since ImmPact is used for reporting immunization records, it only identifies patients that had at least one immunization at their last visit but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in ImmPact will not include any patients that were treated at your organization for any other reason except vaccination purposes.

BENCHMARK REPORTS


Benchmark Report

Select Patient Population

Patients Associated with Selected Site

All Patients associated with IR Physicians

Patients who did NOT meet the benchmark

Patients who DID meet the benchmark

All Patients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

Less than or equal to 72 months old

Birth date range   Earliest Birth date: Latest Birth date:

Age range   Youngest Age: Days   Oldest Age: Days

Options for Benchmarking

Standard Assessment

Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

Clear Selection

Generate   Cancel

Benchmark reports allow ImmPact users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in ImmPact, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:

    a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop-down list at the right. Patients Associated with <Organization Name> OR Patients Residing in < County Name>: immunization data on patients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in ImmPact.)
    b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.
3. Click one of the following to specify the patients to return on the report:
    a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.
    b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.
    c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.
4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.
    a. Less than or equal to 72 months old: all patients who are 72 months old or younger.
    b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
    c. Age range: an age range. In the Youngest Age field, use the drop-down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop-down list to choose days, months, or years.
5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.

Note: Refusals of Vaccine
For patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 19 months			431	43133	431331		
@ 36 months			431	43133	431331		

10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331 combinations at the bottom of the table.
11. Click the **Generate** button.
12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, ImmPact will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
13. Click the **Export as Text** link to display the report in text file format.
14. Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
15. Click the **Display as a PDF** link to display the report in Adobe® Reader.

Patients Associated with Provider: IR Physicians - Report generated on 08/23/2017Page

ImmPact, the Maine Immunization Information System
Report generated on 08/23/2017
Report generated by Lacey Dean
IR Physicians - IRPH - 159874

Filter conditions used for this report:
Patients Associated with Provider: IR Physicians
Both patients who DID or did NOT meet the selected benchmark(s)
Just consider immunizations as meeting the benchmark
Age less than or equal to 72 months
Evaluation date: 08/23/2017
Benchmark age @ 3 months
Selected benchmarks: HepB (1)
Total patients: 31; 1 patients (3%) met all benchmark criteria, 30 patients did not

Number of rows in this report: 31

No	First Name	Last Name	Birth Date	Primary Phone Number	Cell Phone Number	Street	City	State	Zipcode	HepB (1)
1	STEPHEN	COLBERT	10/18/2016			305 E TEST ST.	AUGUSTA	ME	04330	N
2	AGE	EXCEEDED	07/22/2014	(445) 445-4455		2345 MAIN STREET	AUGUSTA	ME	12345	N
3	DONNA	JOE	08/07/2016			200 SOUTH AVE	AUGUSTA	ME	73301	N
4	DUANE	JOHNSON	08/06/2014			108 NORTH MAIN STREET	AUGUSTA	ME	73301	N
5	GEORGE	JONES	01/10/2017			305 E TEST ST	AUGUSTA	ME	73301	N
6	PIPER	JONES	06/16/2012			305 E TEST ST.	AUGUSTA	ME	04330	N
7	CERSEI	LANNISTER	03/11/2014			305 E TEST ST.	AUGUSTA	ME	04330	N
8	JAMIE	LANNISTER	11/06/2016			123 MAIN STREET	AUGUSTA	ME	73301	N
9	TYRION	LANNISTER	08/07/2016			305 E TEST ST.	AUGUSTA	ME	04330	N
10	LUCY	LEE	11/06/2011					ME		N
11	LEAD	LIMITED	07/05/2016	(333) 555-6654		111 MAIN STREET	AUGUSTA	ME	11234	N
12	GEORGE	LUCAS	07/06/2014			10 EAST DOTY ST	AUGUSTA	ME	73301	N
13	DAISY	MAE	08/07/2016			200 SOUTH AVE	AUGUSTA	ME	78022	N
14	EIGHTEEN	MONTHS	02/08/2016			2121 EASY ST	AUGUSTA	ME	04330	N
15	FIFTYNINE	MONTHS	09/08/2012			305 E TEST ST.	AUGUSTA	ME	04330	N
16	FORTYSEVEN	MONTHS	09/08/2013			305 E TEST ST.	AUGUSTA	ME	04330	N
17	ELIZA	NEVILLE	11/10/2016					ME		N
18	LYDIA	NEVILLE	03/11/2014			305 E TEST ST.	AUGUSTA	ME	04330	N
19	EQUALTO	NINEMONTHS	11/15/2016			305 E TEST ST.	AUGUSTA	ME	73301	N
20	LESSTHAN	NINEMONTHS	11/10/2016			305 E TEST ST.	AUGUSTA	ME	73301	N
21	OVERDUE	PATIENT	06/16/2015			200 SOUTH AVE	AUGUSTA	ME	04330	N
22	JON	SNOW	07/05/2015	(207) 256-3451		200 SOUTH AVE	AUGUSTA	ME	04330	N
23	ARYA	STARK	08/09/2016			305 E TEST ST.	AUGUSTA	ME	04330	N
24	BRAN	STARK	11/15/2016			10 EAST DOTY ST	AUGUSTA	ME	04330	N
25	KATLYN	STARK	09/08/2014			200 SOUTH AVE	AUGUSTA	ME	73301	N
26	NED	STARK	09/08/2014			200 SOUTH AVE	AUGUSTA	ME	73301	N
27	SANSA	STARK	08/01/2015			305 E TEST ST.	AUGUSTA	ME	04330	N

Note: The size of your file is not limited when you choose to export the Benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message "file not loaded completely" will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

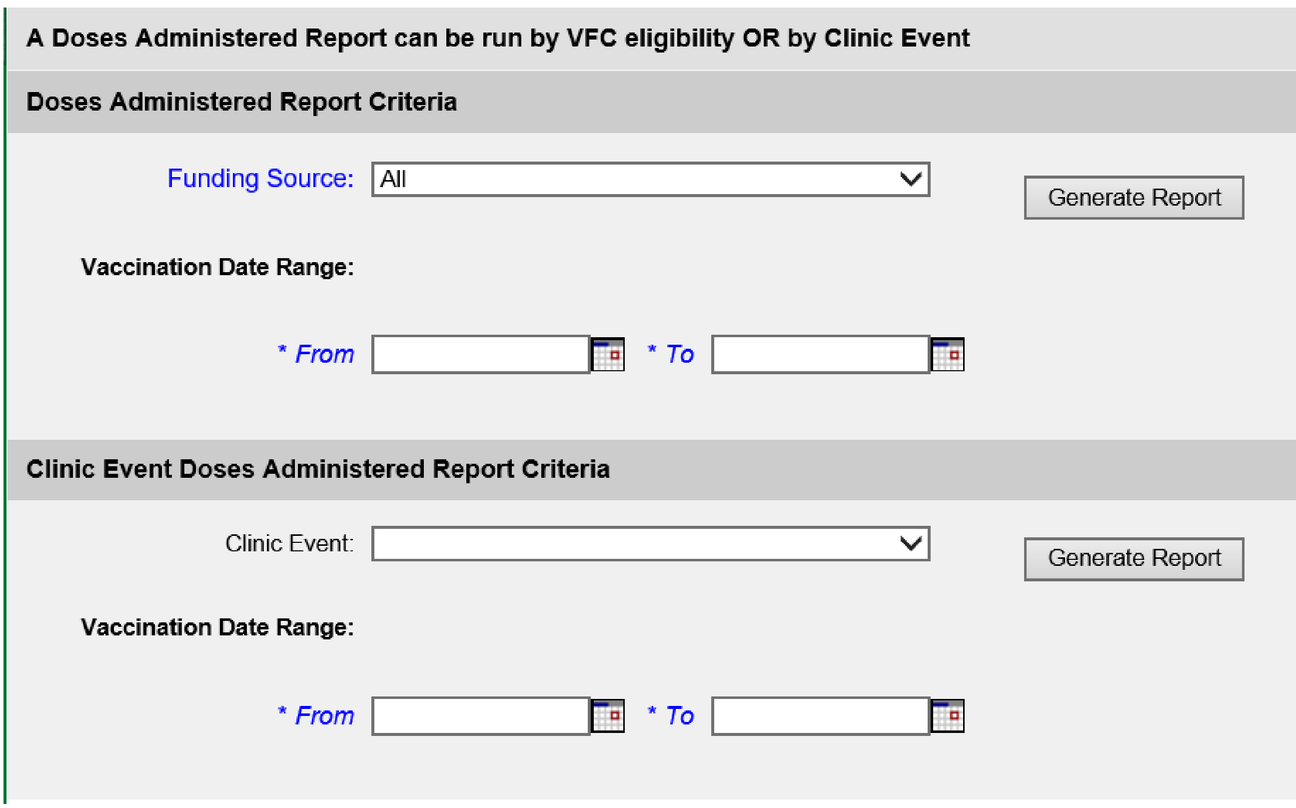
Doses Administered Report

The Doses Administered Report will produce doses administered data only for those organizations that have entered *non-historical* immunization data into the system. A user may run a report based on Funding Source, or Clinic Events. To generate a report, complete the following steps:

1. Click **Doses Administered** from the Inventory menu group

2. To run a report by Funding Source, select an option from the Funding Source dropdown and enter a valid From and To date in MM/DD/YYYY format or using the calendar icon. Select the ‘Generate Report’ button.

3. To run a report by Clinic Event, select an event from the dropdown, or leave blank to search all events the organization has participated in. Enter a valid From and To date in MM/DD/YYYY format or using the calendar icon. Select the ‘Generate Report’ button


A Doses Administered Report can be run by VFC eligibility OR by Clinic Event

Doses Administered Report Criteria

Funding Source: All

Generate Report

Vaccination Date Range:

* From * To

Clinic Event Doses Administered Report Criteria

Clinic Event:

Generate Report

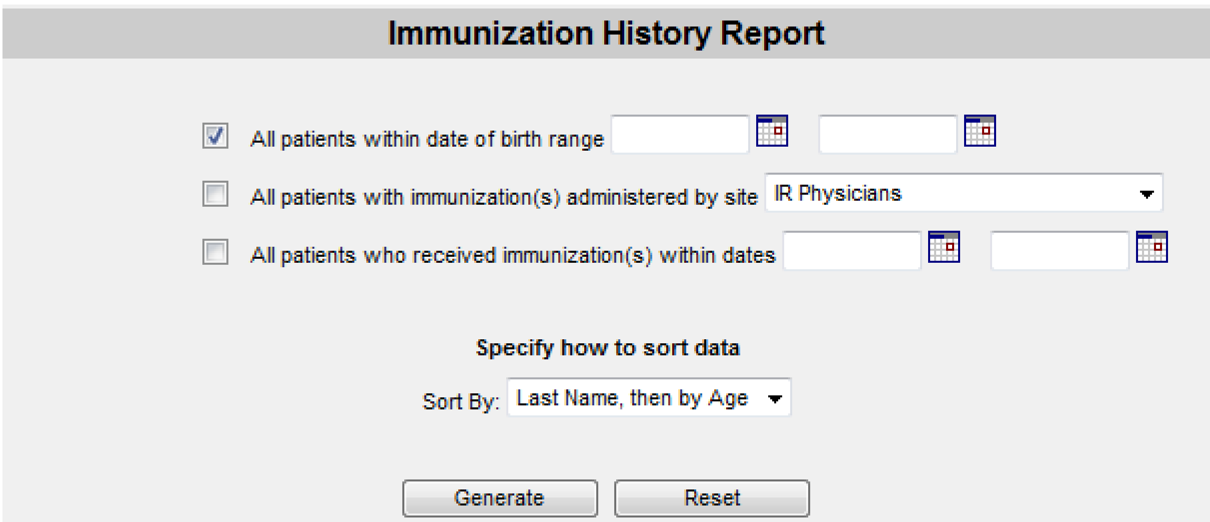
Vaccination Date Range:

* From * To

Group Patients Report

The purpose of Group patients is to run either the Immunization History Report for a group of selected patients. To run one of these reports, complete the following steps:

1. Click **Group Patients** under the Reports section of the menu panel.



2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop-down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.

Note: You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.

5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.

7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) The system starts to generate the report and takes you to the Group Patient Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.

Group Patient Reports Request Status Refresh

Report Name	Started	Completed	Status	Patients
Immunization History Report	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3
Immunization History Report	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5

9. The system displays the report output in PDF.

REMINDER/RECALL

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

Note: Generation of reminder and recall notices
Reminder and recall notices can be generated for each patient, if the following conditions are met:

- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? Indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.

Reminder Request Status screen

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.

Note: Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in ImmPact while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of ImmPact and return to the status screen by clicking on the Check Reminder Status link after logging in again.

Summary Screen

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary

Reminder Request Criteria

Step	Criteria Evaluated at this Step	Patients
1	Patients **associated** with *IR Physicians*.	65
2	Patients **immunized** by *IR Physicians*.	64
3	Patients that are **active** within *IR Physicians* and **allow Reminder & Recall Contact**. Additional criteria includes: • **Birthdate range** is not specified; • **School** is not specified; • **Provider** is not specified.	3
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified; • **Zip Code** is not specified.	3
5	Patients that meet the following criteria regarding vaccination status: • ; • Use all **vaccine groups**; • Use **tracking schedule** associated with each patient.	3
	Total Number of Patients Eligible for Reminder	**3**

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Preview Patients that will display on the Reminder Recall Report.	Preview Patients
*Increment last notice date for all patients **eligible for this reminder**.*	Increment Eligible
*Increment last notice date for **all patients immunized** by IR Physicians.*	Increment Immunized
Return to the previous screen.	Cancel

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient's demographic record.
2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient's demographic record under the organization information section.
3. Increment last notice date for all patients immunized by your organization.
4. Click **Cancel** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	Report Name Free Text Phone #

   a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
   b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
   c. The telephone number is presented in the closing for each of the letters generated in your report.
2. Click **Reminder Letter**, which is a hyperlink.
3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of ImmPact or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. The card allows room at the top for a greeting. The body of the card includes the patient's recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Cards, follow these steps:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering the following information: o If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
2. You may include a maximum of 400 characters in the Free Text field. Any information entered in this text box will be presented as the closing for each of the cards generated in your report.
3. The telephone number is presented in the closing for each of the cards generated in your report.

Dear Parent of Violet Georgia Dallman,

Our records show that Violet Georgia Dallman may be due for the following immunizations. If Violet received these or other immunizations from another health care provider, please call our office so that we can update Violet's record. Otherwise please schedule an appointment for Violet to receive them.

Immunizations Due
DTaP, NOS
HepA, NOS
HepB, NOS
Hib, NOS
MMR
PCV13
Polio, NOS
Varicella

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of ImmPact or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
    a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
    b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the **Patient Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
    a. You have the option of moving to other portions of ImmPact or using other functions of your computer while you are waiting for your report to process. To return to check the progress of

your request clicks on Check Reminder Status under Reports on the menu panel.
    b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

Reminder Request Status

Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

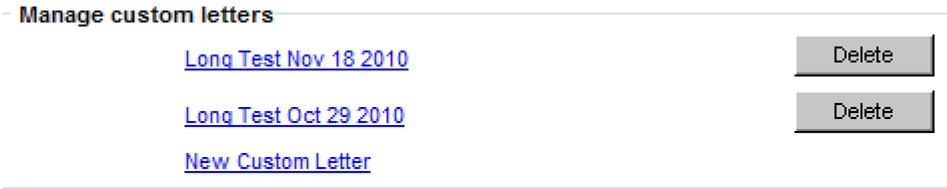
Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

Creating Custom Letters

In addition to the standard letter, ImmPact allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

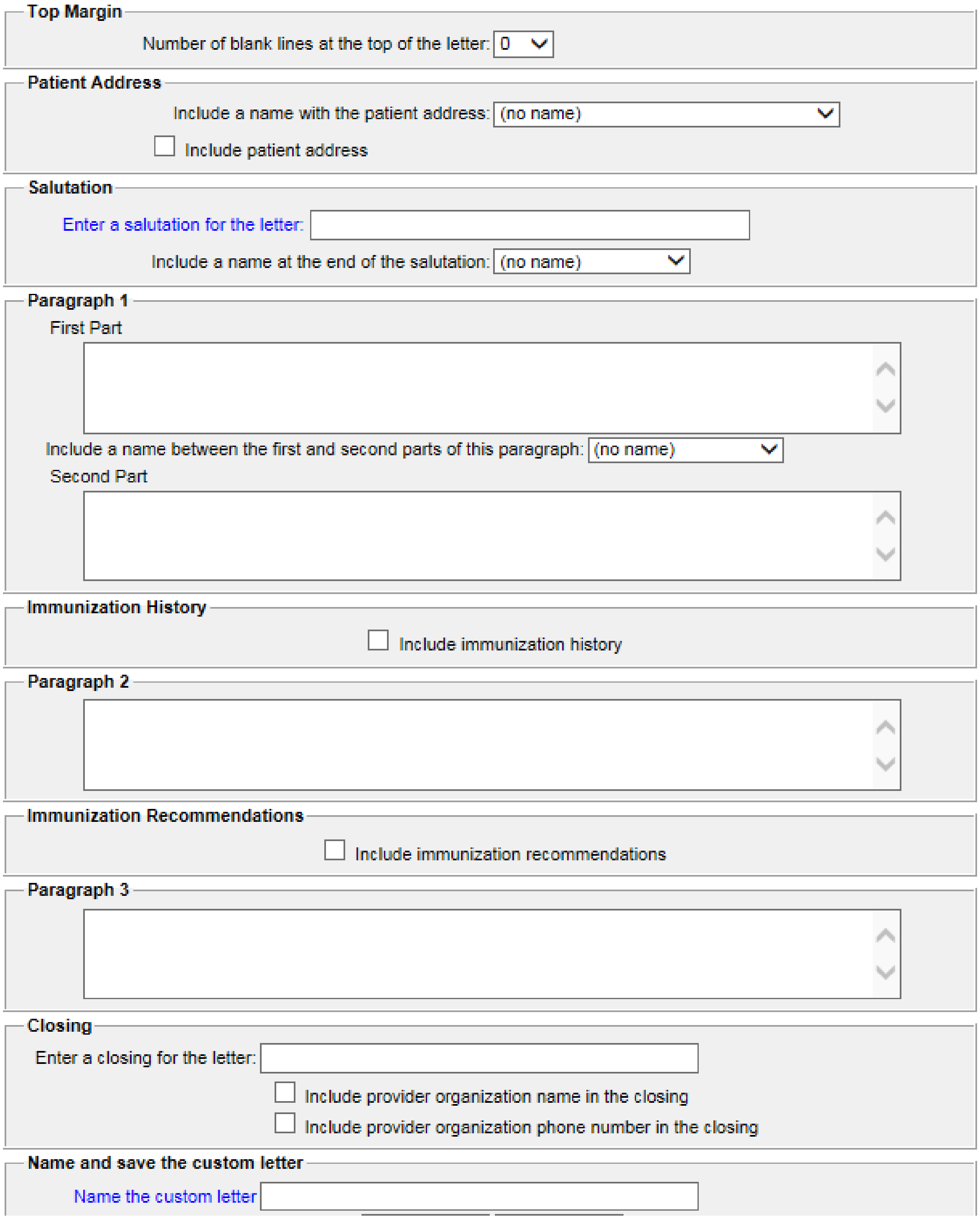
1. Click **Manage Custom Letter** under Reports on the menu panel.



2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
    a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop-down list provided. These blank spaces will leave room to print the letters on your office letterhead.
    b. Include Patient Address:
        i. Check the box to include the patient's address at the top of the letter.
    c. To include a name with the patient address, choose from the drop-down list one of the following:
        i. (no name) - default
        i. Patient name - To the parent/guardian of patient name
    b. Salutation: Enter a greeting, and then choose a name option from the drop-down list provided.
        i. If name is chosen, the name of the patient will show up after the salutation.
        ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>
4. Paragraph 1:
    a. In the field marked First Part, enter desired text.
    b. If you do not wish to include a name, you may enter all the first paragraph text in the field marked First Part and select no name from the name drop down list.
    c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop-down list (either parent/guardian, patient name or no name).
    d. In the field marked Second Part, continue to enter the rest of the text.
    e. Immunization History: Check the box to include the patient's immunization history in the letter.

    f. The maximum amount of allowed characters in this field is 4,000.
5. Paragraph 2: You may enter more text in this field.
    a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.

   b. The maximum amount of allowed characters in this field is 4,000.
6. Paragraph 3: You may enter text in this field.
   a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.
   b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
   c. The maximum amount of allowed characters in this field is 4,000.


Top Margin

Number of blank lines at the top of the letter: 0

Patient Address

Include a name with the patient address: (no name)

Include patient address

Salutation

Enter a salutation for the letter:

Include a name at the end of the salutation: (no name)

Paragraph 1

First Part

Include a name between the first and second parts of this paragraph: (no name)

Second Part

Immunization History

Include immunization history

Paragraph 2

Immunization Recommendations

Include immunization recommendations

Paragraph 3

Closing

Enter a closing for the letter:

Include provider organization name in the closing

Include provider organization phone number in the closing

Name and save the custom letter

Name the custom letter

Note: Once you have saved the custom letter, click on check reminder status in the left-hand menu bar. Then select the reminder report you want to use to generate your custom letter.

Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

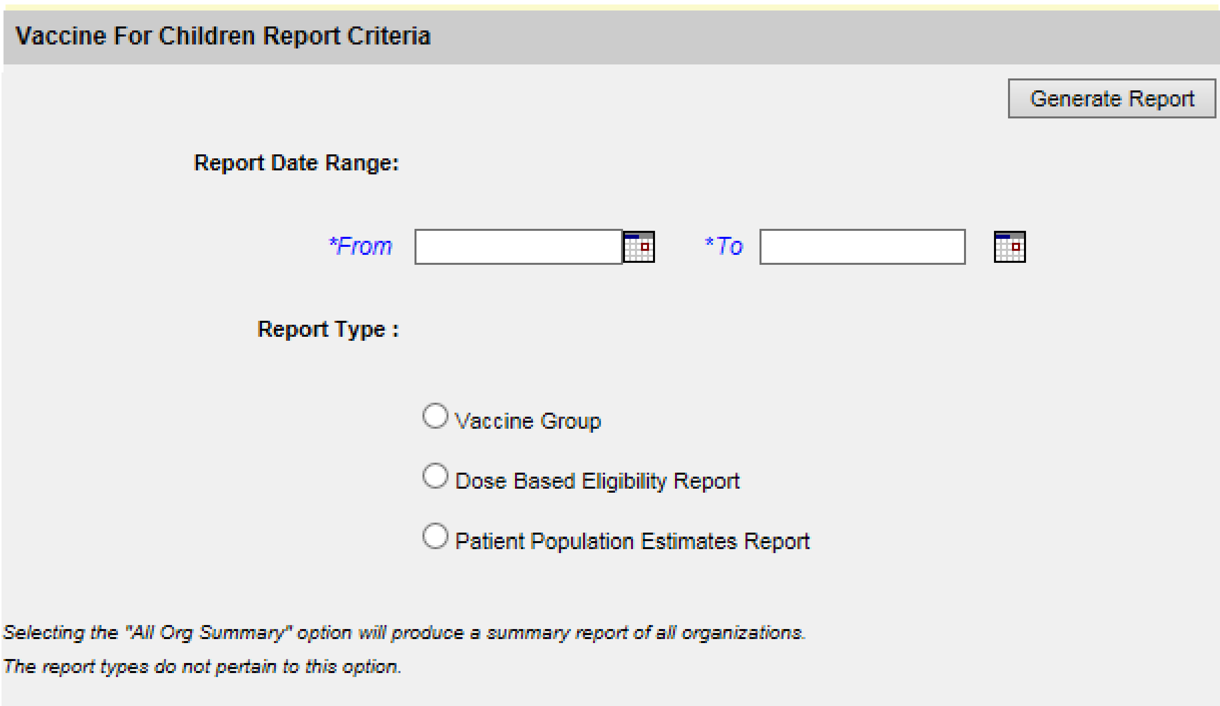
1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of ImmPact or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process Summary screen.

VACCINE ELIGIBILITY

The Vaccines for Children (VFC) Report details the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.



2. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
3. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
4. Choose a type of VFC Report to run. You have three choices:
   a. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups
   b. The Dose Based Eligibility Report displays the number of doses given by your site.
   c. The Patient Population Estimates Report displays the total number of unique patients immunized by your site.
5. Click the **Generate Report** button. The reports drop into a processing queue:

VFC Report Status

Refresh

Report Name	Started	Completed	Status
VFC Patient Popluation Estimates	08/04/2016 07:55:36 AM	08/04/2016 07:55:36 AM	100%
VFC Dose Based Eligibility	08/04/2016 07:52:10 AM	08/04/2016 07:52:11 AM	100%
VFC by Vaccine Group	08/04/2016 07:49:44 AM	08/04/2016 07:49:44 AM	100%

6. Click Refresh until the statuses are 100%; then click on the underlined hyperlink, and you will be presented with an adobe file which contains your report. From here you can print the document; then close the document window to return to the results screen.

VFC by Vaccine Group

ImmPact Vaccines for Children

For Dates Between 11/01/2017 and 11/28/2017

Report run on: 11/28/2017 12:50 PM

Organization: IR Physicians - 159874

Key: Vaccine Eligibility Code

V01 - Private Stock	V05 - VFC Eligible – Underinsured
V02 - VFC Eligible - Medicaid/MaineCare - Under 19	V07 - 317 Eligible – Uninsured Adult
V03 - VFC Eligible - Not Insured	MEA01 - State Eligible - Insured - Under 19
V04 - VFC Eligible - American Indian or Alaskan Native	UNK - Unknown

Vaccine	V01	V02	V03	V04	V05	V07	MEA01	UNK	Total
Adeno	0	0	0	0	0	0	1	0	1
Cholera	0	0	0	0	0	1	0	0	1
DTP/aP-HepB-Polio	0	0	1	0	0	0	0	0	1
Encephalitis	0	1	0	0	0	0	0	0	1
Total	0	1	1	0	0	1	1	0	4

Dose Based Eligibility Report

ImmPact

Dose Based Eligibility Report

Printed on: 11/28/2017 12:51 PM

Vaccination Date Range: 06/01/2017 to 11/28/2017

Provider ID: IRPH

This report displays the total number of vaccine doses give by your site **(Doses Administered)** during the date range, sorted by patient age and vaccine eligibility. It also extrapolates the date range doses totals to a full year (Annualized).

Vaccine Eligibility	Doses Administered									
	<1 yr		1-6 yrs		7-18 yrs		19+ yrs		Total	
	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized
A. VFC Eligible - Medicaid/MaineCare - Under	0	0	0	0	1	2	0	0	1	2
B. VFC Eligible - Not Insured	4	8.2	0	0	0	0	0	0	4	8.2
C. VFC Eligible - American Indian or Alaskan	0	0	0	0	0	0	0	0	0	0
D. VFC Eligible - Underinsured	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D)	4	8.2	0	0	1	2	0	0	5	10.2
E. 317 Eligible - Uninsured Adult	0	0	0	0	1	2	0	0	1	2
F. State Eligible - Insured - Under 19	0	0	0	0	1	2	0	0	1	2
SUBTOTAL (A+B+C+D+E+F)	4	8.2	0	0	3	6	0	0	7	14.2
G. Private Stock	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D+E+F+G)	4	8.2	0	0	3	6	0	0	7	14.2
H. Eligibility Unknown	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D+E+F+G+H)	4	8.2	0	0	3	6	0	0	7	14.2

Patient Population Estimates Report

ImmPact

Patient Population Estimates Report

Printed on: 11/28/2017 12:54 PM

Vaccination Date Range: 06/01/2017 to 11/28/2017

Provider ID: IRPH

This report displays the total number of unique patients immunized by your site **(Patients)** during the date range, sorted by patient age and vaccine eligibility. at the time of vaccination. It also extrapolates the date range doses totals to a full year (Annualized).

Vaccine Eligibility	Patients									
	<1 yr		1-6 yrs		7-18 yrs		19+ yrs		Total	
	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized	Date Range	Annualized
A. VFC Eligible - Medicaid/MaineCare - Under	0	0	0	0	1	2	0	0	1	2
B. VFC Eligible - Not Insured	1	2	0	0	0	0	0	0	1	2
C. VFC Eligible - American Indian or Alaskan	0	0	0	0	0	0	0	0	0	0
D. VFC Eligible Underinsured	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D)	1	2	0	0	1	2	0	0	2	4
E. 317 Eligible Uninsured Adult	0	0	0	0	0	0	0	0	0	0
F. State Eligible - Insured - Under 19	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D+E+F)	1	2	0	0	1	2	0	0	2	4
G. Private Stock	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D+E+F+G)	1	2	0	0	1	2	0	0	2	4
H. Eligibility Unknown	0	0	0	0	0	0	0	0	0	0
SUBTOTAL (A+B+C+D+E+F+G+H)	1	2	0	0	1	2	0	0	2	4

Detailed List of Inventory Transactions

The code is what is displayed in the Show Transactions report in ImmPact.

	CODE	-/+	DESCRIPTION	SOURCE OF TRANSACTION	SOURCE TYPE
A	REC	+	Receipt of Inventory	Edit Inventory reason pick list	manual
B	REC	+	Receipt of Inventory	Add inventory is saved, Order/transfer Received	automated
C	RET	+	Doses Returned	Rejected transfer that is restocked in inventory	automated
D	RET	+	Doses Returned	Edit Inventory reason pick list	manual
E	TRA	-	transfers out of inventory	Orders from or transfers from inventory	automated
F	TRA	-	Doses Transferred	Edit Inventory reason pick list	manual
G	Immunize	-	Immunizations Given	Imm is added to patient's record	automated
H	Delete	+	Immunizations Deleted	Imm is deleted from patient record	automated
I	ERR	+ or -	Error Correction	Edit Inventory reason pick list	manual
J	RECALL	-	Doses Recalled	Edit Inventory reason pick list	manual
K	ADMIN	-	Doses Administered	Edit Inventory reason pick list	manual
M	3	-	Spoilage reported by Provider	Edit Inventory reason pick list	manual
N	4	-	Expiration reported by Provider	Counts auto-generated when reports run	automated
O	5	-	Lost/damaged in transit to Provider	Edit Inventory reason pick list	manual
P	6	-	Failure to Store properly……….	Edit Inventory reason pick list	manual
Q	7	-	Refrigeration	Edit Inventory reason pick list	manual

			failure…………		
R	11	-	Lost or Unaccounted for ………	Edit Inventory reason pick list	manual
S	12	-	Other - Not useable, per Provider	Edit Inventory reason pick list	manual
T	BORROWEDIN	+	Borrowed In	Edit Inventory reason pick list	manual
U	BORROWEDOUT	-	Borrowed Out	Edit Inventory reason pick list	manual
V	TRAEXP	n/a	Transfer out Expired Inventory	Transfer of Expired Inventory (i.e., back to mfg)	automated
W	BORROWED	-	Borrowed Imm Given	Borrowed Imm is added to patient record	automated
X	LOTDELETE	-	Lot Deleted	Edit Inventory Delete button	automated

Inventory Transactions within Vaccine Accountability Report columns

+ Starting Inventory	+ Doses Received	− Doses Reported	− Doses Expired	− Doses Spoiled	− Doses Wasted	− Doses Transferred Out	+ Ending Inventory	Accounted for Doses	Accounted for %
1	2	3	4	5	6	7	8	9	10
ending inventory from prior report run	A, B, C, D, T and I when positive	G*,W*, (H*)	N, V	M, P, Q	J, S, and I when negative	E, F, O, U, X	active, non-expired QOH per system		

Note that some transaction types are treated differently based on whether they are accompanied by a valid vaccine eligibility code:

G*, W* = count if the immunization administered contains a vaccine eligibility code
H* = Delete transaction of an immunization administered that contains a vaccine eligibility code, which lowers the count of Doses Reported

Unaccounted for transactions: K, R, G**, W**, H**

G**, W** = unaccounted for if the immunization administered does not contain a vaccine eligibility code
H** = Delete transaction of an immunization administered that does not contain a vaccine eligibility code

CHAPTER 15: DATA EXCHANGE

In this chapter:

Introduction

Thank you for your interest in electronic data exchange with ImmPact. Getting immunization data into ImmPact is important for your clinic and for the individuals you serve. ImmPact is interested in finding the least burdensome method for your clinic to submit data to ImmPact.

Data Frequency

Timely data submission to ImmPact benefits providers and the patients they serve by making complete immunization records accessible through the system as soon as possible. Real-time data submission is possible via Health Level Seven (HL7) real-time messaging (see Data Formats Accepted below).

Data Formats Accepted:

ImmPact currently accepts the following electronic file types:

- Health Level Seven (HL7) Version 2.5.1 standard files
- Health Level Seven (HL7) Version 2.5.1 Real Time Transfer
- Fixed format flat text files (Blood Lead and Health Plans Only)

Data Exchange via the ImmPact Web Service

Your clinic must first register at the ImmPact IZ Portal then follow instructions received in the confirmation email. EHR submissions to ImmPact2 must use SOAP transport and the ImmPact WSDL. Please see the: ImmPact HL7 v2.5.1 Data Exchange Specifications and ImmPact2 Test Plan (SOAP/WSDL setup) documents for message specifications and instructions.

Data Exchange via the ImmPact Interface

The data exchange feature of ImmPact allows the capability to exchange patient, immunization and comment data files. Only ImmPact state staff or other users with Data Exchange roles will be able to perform data exchange.

HEALTH PLAN DATA EXCHANGE

Prior to performing an HMO data exchange, your HMO will need to contact the ImmPact Data Exchange staff and arrange for your organization to be set up to perform data exchange.

You will need to provide the following information on your whether you prefer to submit patient data in HL7 (Under Constriction).

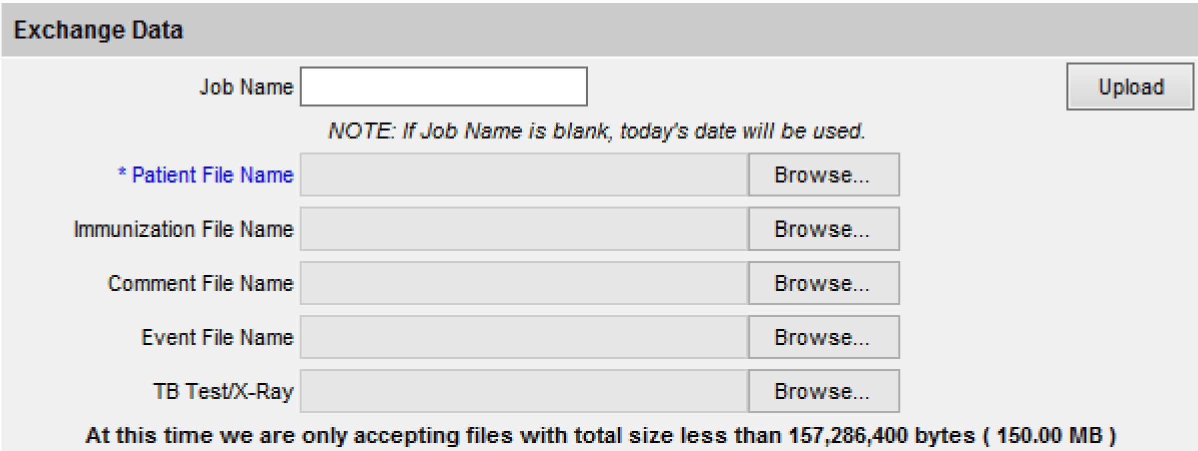
Note: Files have a size limit of 150 MB combined of the patient, immunization, and comment files that can be uploaded via the user interface. If files are larger than 150 MB, they will need to be split into smaller files for loading.

To perform a Health Plan Data Exchange:

1. Click Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
    a. Job Name: Fill in a name for the data exchange, if desired. If left blank, ImmPact will use the current date for a job name.
    b. For Flat File Submissions:
    c. Patient File Name: This field is required if your file format is Flat File. Click on Browse to select the appropriate Patient File Name.
    d. Immunization File Name: This optional field will appear if you exchange data via Flat File format. HMO/MCOs are not required to send immunization data.
    e. Comment File Name: This is an optional field that will appear if you exchange data via Flat File format.
    f. For HL7 File Submissions:
    g. File Name: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.
    h. For HMO Query Files:
    i. This field is required for users who are running an HMO query. Click on Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.

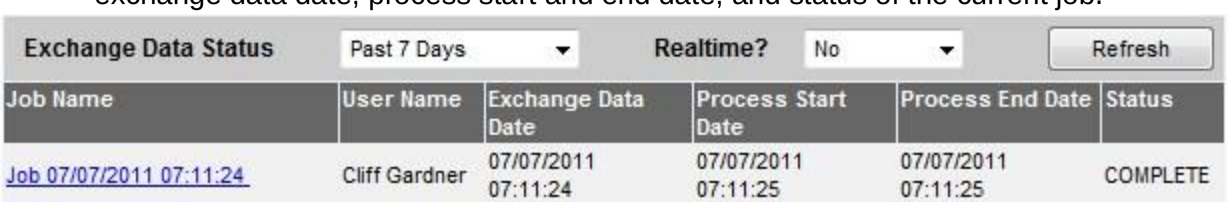
Note: The Health Plan must first submit patient data into ImmPact before a query will run successfully. Only patients that are shown to be affiliated with a Health Plan will be returned to the Health Plan via a data query.

Submit HMO Data Screen:



1. Browse to the Patient File and select. Do this with each file type you'd like to load.
2. When finished selecting files to load, click **Upload**.
3. The Exchange Data Result screen will display and list the files that were uploaded and confirm the job name you entered or provide the date as a job name.

4. Click the **Check Status** button.
5. The Exchange Data Status screen will display, and contain the job name, user name, exchange data date, process start and end date, and status of the current job.



6. Click **Refresh** periodically to check the status of the job.
7. When a job is complete, the job name will appear as a hyperlink.

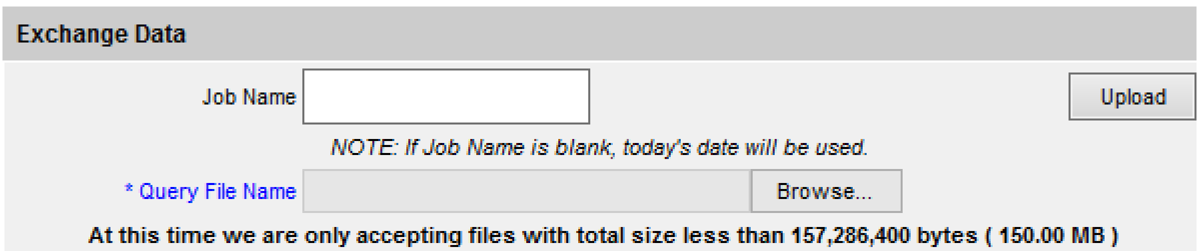
   Under the status column, one of three messages may appear:

   a. Complete: has completed processing
   b. Error: could not be processed because of formatting errors
   c. Exception: could not be processed because of an internal system error

8. Click the job name hyperlink.
9. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:

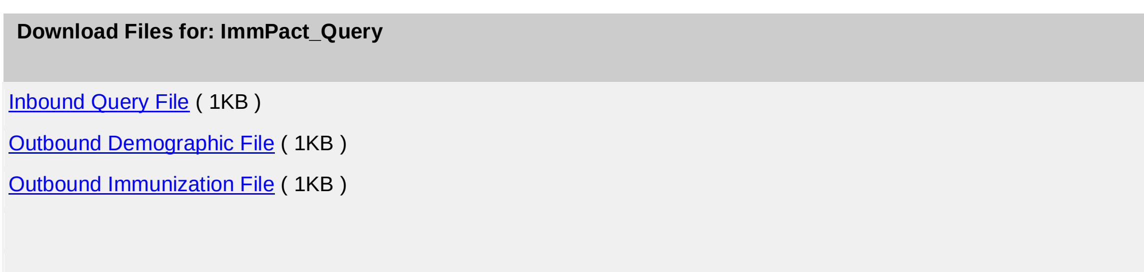
a. Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "ImmPact to provider organization" download files. Click on the download name hyperlink to download the file.
b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
c. Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

Submit HMO Query Screen:



1. For jobs created using the Submit HMO Query menu option, the following sections will display:
   a. Download Files for: <Job Name>: Contains the Inbound Query File, Outbound Demographic File, Outbound Immunization File, and Exception File, if there was an error processing the Inbound Query File, all available for download by clicking on the file name hyperlink.
   b. Download Log for: <Job Name>: Contains information regarding activity of the download files.
2. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed, the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Query Result File Formats



Use of the Check Status

Your clinic can monitor ongoing Data Exchange activity using the Check Status functionality.

1. Click **Check Status**.
2. Set the time period whether 'Realtime?' in the choices
3. The Exchange Data Check Status screen will contain the job name, user name, exchange data date, process start and end date and status of recent jobs.

Exchange Data Status Past 7 Days **Realtime?** No Refresh

Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
Job 07/07/2011 06:57:49	Cliff Gardner	07/07/2011 06:57:49	07/07/2011 06:57:49	07/07/2011 06:57:49	COMPLETE
Job 07/07/2011 06:57:31	Cliff Gardner	07/07/2011 06:57:31	07/07/2011 06:57:32	07/07/2011 06:57:33	COMPLETE

4. Click **Refresh** periodically to check the status of the job, it will not automatically update.
5. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear.
    a. Complete: the job has completed processing
    b. Error: the job could not be processed because of formatting errors
    c. Exception: the job could not be processed because of an internal system error
6. Click the job name hyperlink.
7. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:
    a. Download Files for: <Job Name>: This section contains all output files available for you to download including the Response Files and any "ImmPact IIS to provider organization" download files. Click on the download name hyperlink to download the file. Under the HL7 251 Response link, there is a link to the file that was uploaded into Data Exchange, Inbound HL7 251 File. Similar links appear for jobs using HL7 flat file and CSV file formats.
    b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s) including file name, user name, date, and time of the download(s).
    c. Summary Information for: <Job Name>: This section contains a summary of all the information pertinent to the exchanged data file received and processed.
8. Review the summary figures to ensure complete uploads. The response files can be searched for record rejections.
9. Patients put into pending file are reviewed and merged (where a client already exists in the system). Once merging is complete, data are viewable in the IIS.

If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed the original uploaded file(s) and information regarding the activity of the downloaded file(s).

DES-DEC FIX TOOL

When a provider organization submits immunization records via the Data Exchange in ImmPact, there may be instances where the wrong information is submitted with the immunization record (such as the wrong vaccine trade name or incorrect lot number), causing the immunization to not decrement from the provider organization's inventory. When this sort of error occurs, ImmPact allows the provider organization to correct the error through the User Interface, using the Des-Dec Fix Tool.

To use the Des-Dec Fix Tool:

1. Click on the **Des-Dec Fix Tool** link under the Data Exchange section of the menu panel.

2. Once on the **Des-Dec Fix Tool** screen, the user will see all Data Exchange transactions for which ImmPact was unable to decrement the immunization from inventory.

3. The user can then use the "Trade Name" and "Actual Lot/Funding Source" drop-down menus to change the immunization's information. Selecting a Trade Name and Actual Lot will enable the **Update** button to be selected. Select the Update checkbox and click the **Update** button to complete the transaction.

4. Once these steps are completed successfully, ImmPact will correctly decrement the immunization from the provider organization's inventory.

Immunizations Not Decremented for Organization: - IR Physicians - 159822								Record Count: 4
Vaccination Date	Lot/CVX	Eligibility	Trade Name	Patient Name	DOB	Actual Lot	Update	Remove
02/11/2020	5598A/08 - HepB-Peds	VFC Eligible - Underinsured		NORTH, MATTHEW	02/10/2020			
01/11/2020	5598A/08 - HepB-Peds	VFC Eligible - Not Insured		HIGGINS, JENNIFER	01/10/2020			
01/08/2018	HH794HD/21 - Varicella	VFC Eligible - Medicaid/MaineCare - Under 19		THOMPSON, SAMANTHA	01/09/2017			
06/05/2019	R025731/116 - Rotavirus, Pent	State Eligible - Insured - Under 19		VINCENT, AMANDA	04/05/2019			

1 of 1

Note: For more fundamental errors, such as an incorrect patient name or vaccination date, the Des-Dec Fix Tool cannot be used. The provider organization must re-submit those immunization records via Data Exchange.

Note: Users can also remove transactions by selecting the Remove checkbox followed by the Remove button. Removing a transaction from the Fix Tool will not deduct the transaction from inventory. Removing a transaction from the Fix Tool will not remove the immunization from the patient's immunization history.

DES-DEC DETAIL REPORT

ImmPact also allows provider organizations to view all Data Exchange transactions that resulted in the immunization record not being decremented from inventory through the Des-Dec Detail Report.

To view the Des-Dec Detail Report:

1. Click on the **Des-Dec Detail Report** link under the Data Exchange section of the menu panel.

2. Select the organization for which the user wishes to run the report from the “Organization” drop-down menu.

3. Select a date range for the report.

4. Select a “Sort Order” of either “Alphabetical Listing” or “Transaction Date.”

5. Click the **Generate Report** button.

The Des-Dec Detail Report will show the user all the Data Exchange transactions for which the user’s organization either received an error message indicating the immunization was not decremented from inventory, or where the vaccination date for the record was prior to the provider organization’s reconciliation date.

CHAPTER 16: SCHOOL USER

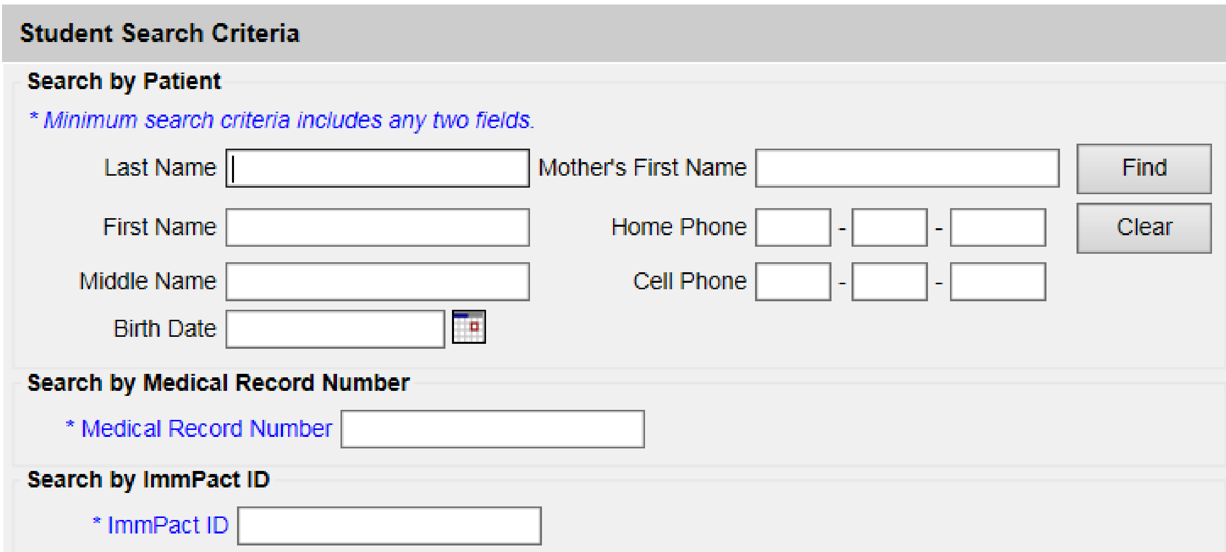
In this chapter:

Finding Student Screen

The Find Student screen is used to search and locate any student existing in the ImmPact application using any two search fields in the search screen.

There are two main sections used in the Find Student screen:

- Enter Search Criteria for a Student
- Search Results



Search Criteria

1. Click **Find Student** under the School Access menu group on the left side of the screen.
2. In the Student Search Criteria box, you search using any two fields unless you are using Medical Record Number or ImmPact ID.
    a. Last Name: Entering at least the first two letters of the student's last name, along with the birth date, will begin a search of all students whose last name begins with those letters.
    b. First Name: Entering at least the first two letters of the student's first name, along with the birth date, will begin a search of all students whose first name begins with those letters. If a student's first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
    c. Middle Name: Entering at least the first two letters of the student's middle name, along with the birth date, will begin a search of all students whose middle name begins with those letters. If a student's middle name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
    d. Mother's First Name: Entering at least the first two letters of the mother's first name, along with the birth date, will begin a search of all students whose mother's first name begins with those letters. If the mother's first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
    e. Phone: Entering the student's main 7-digit phone number (area code not required) and birth date will identify individuals with the exact phone number in ImmPact. However, this method is not

recommended, as a phone, number may not be entered for a student, and phone numbers may change over time.

3. Click the **Find** button.

Entering Names

On all first and last names entered into ImmPact for student searches, ImmPact disregards spaces, apostrophes, and hyphens entered.

Search Results

List of Possible Matches

A list of possible matches means the search returned more than one student match. All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by last name; first name, middle name, birth date, and gender are also included in the table for each student. Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The Student Immunization Record screen is then displayed containing the student immunization information.

No Match Found

Please try at least twice to be sure the student is not in the system. For example, you can search once using the date of birth and last name, and once using date of birth and first name. Parents may have immunization information but if the child was born in another state or received services from a provider who did not report to ImmPact, the information may not be in ImmPact. A blank CIS form is available from the forms list.

Threshold Limit

When searching in the database, if the number of students exceeds 75 matches, then no students will be listed. Instead, the following message will display:

"XX students were found. Please refine your search criteria to limit your student list." (XX is the total number of students found in the search.)

In the unlikely event you receive this message, clear your search criteria and try again with information that is more detailed.

Student Immunization Record Screen

The Student Immunization Record screen displays a student's immunization history and provides immunization recommendations. From this screen, you are able to select and add the student to a specific student list. This will allow you to run reports that include the student.

There are three main sections used in the Student Immunization Record screen:

- Student Information
- Immunization Record
- Vaccines Recommended
- Blood Lead Risk Assessment and Lead Test Recommendations

Student Information				Print Confidential	Cancel
Student Name (First - MI - Last)	DOB	Gender	Tracking Schedule		
SCHOOL PATIENT	05/17/2007	F	ACIP		

Current Age: 10 years, 3 months, 6 days

Reports

Add this Student to a Report List — Please Pick a Report List

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction
DTP/aP	05/17/2008	1 of 5	DTaP, NOS [DTaP, NOS ®]		
HepA	05/17/2007	NOT VALID	HepA, NOS [HepA, NOS ®]		
HepB	05/17/2007	1 of 3	HepB, NOS [HepB ®]		
	06/17/2007	2 of 3	HepB, NOS [HepB ®]		
MMR	05/17/2008	1 of 2	MMR [MMR II ®]		
	05/17/2011	2 of 2	MMR [MMR II ®]		
Polio	07/17/2007	1 of 4	Polio, NOS		
	09/17/2007	2 of 4	Polio, NOS		
Td/Tdap	05/17/2014	1 of 2	Td (adult), NOS		
	11/17/2014	2 of 2	Td (adult), NOS		
Varicella	05/17/2008	1 of 2	Varicella [Varivax ®]		
	05/17/2011	2 of 2	Varicella [Varivax ®]		

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS		**Maximum Age Exceeded**	
HepA	HepA, NOS	05/17/2008	05/17/2008	**12/17/2008**
HepB	HepB, NOS	11/01/2007	11/17/2007	**12/17/2008**
HPV	HPV, NOS	05/17/2016	05/17/2018	11/17/2019
Influenza-seasnl	Flu NOS	05/17/2016	05/17/2016	**05/17/2016**
Meningo	MCV4, NOS	05/17/2018	05/17/2018	05/17/2020
MMR	MMR		**Complete**	
Polio	Polio-Inject	10/15/2007	11/17/2007	**12/17/2008**
Td/Tdap	Tdap	11/17/2019	11/17/2019	11/17/2024
Varicella	Varicella		**Complete**	

Risk Assessment and Lead Test Recommendations

Although routine risk assessment based blood lead testing is **not required** for children either less than 9 months of age or those six years and older, health care providers may choose to test children at any age for blood lead based upon their assessment of the child's risk.

- Click here to review the **Maine CDC Blood Lead Screening Guidelines, including the annual risk assessment questionnaire**

Student Information

The Student Immunization Record screen displays a student information header at the top of the page. This section includes student name, date of birth (DOB), gender, and selected tracking schedule. The information contained in this section can be used to confirm that you have located the correct student.

Tracking Schedule

Select the appropriate tracking schedule from the drop-down menu. This function allows users to change the tracking schedule to evaluate the record according to school law requirements based on the grade of the student. If a grade level tracking schedule is selected, the Earliest Date, Recommended Date and Past Due Date will be the same and identify vaccines for which the student is incomplete according to school requirements. ACIP is the clinical schedule and is the default. The ACIP schedule should be used when printing out a record for the parent so they know when they can obtain immunizations for their child.

Print Confidential

This button allows you to print the record showing on the screen. This record may be helpful for parents when scheduling immunizations for their child.

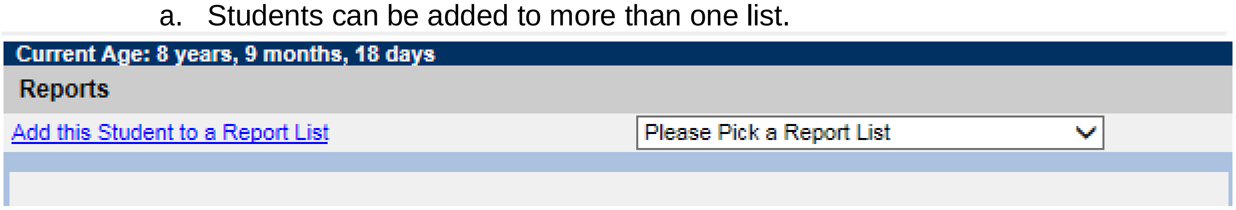
Cancel

This button cancels the screen and takes you back to the previous screen.

Adding Students to a Report List

To add a student to a list, you must have first created specific student report lists in the Manage Lists section of the application. See the Manage List Screen section of this chapter for details.

1. Click the “Please pick a Report List” drop-down menu and select your list from the available options.
2. Then click the “Add this Student to a Report List” hyperlink.
    a. Students can be added to more than one list.



STUDENT IMMUNIZATION RECORD

The Immunization Record table lists all vaccinations the student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

- Vaccine Group
    - Lists the vaccine group name for each immunization received.
- Date Admin
    - Lists the date the student received the vaccine.
- Series
    - Denotes the sequence number within the immunization series and contains messages such as “Not Valid”, if the vaccine does not meet the requirements of the selected tracking schedule.

- Trade Name
    - Displays the trade name of the vaccination received.
- Dose
    - Indicates whether full, half, or multiple doses were administered to the student. A blank field is the default for a full dose.

Note:
Doses marked as Subpotent or Not Valid are counted for school/children's facility immunization law compliance. The exceptions are MMR, Varicella, and Hepatitis A doses given before the first birthday. Maine accepts these dates for school attendance purposes because revaccination is a clinical decision.

The student's age appears in a solid blue field between the student information and reports sections.

Vaccines Recommended

Find the recommended vaccinations and corresponding dates for the student in the Vaccines Recommended by Selected Tracking Schedule table. The vaccine group list shows all vaccinations included in the tracking schedule assigned to this student. The table columns are defined as follows:

Vaccine Group	Displays the vaccine group name.
Vaccine	Displays the specific vaccine name.
Earliest Date	Displays the earliest date the student could receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Earliest Date will be when the student is incomplete for the vaccine according to Oregon school law requirements.
Recommended Date	Displays the date that the student is recommended to receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Recommended Date will be when the student is incomplete for the vaccine according to Maine school law requirements.
Past Due Date	Displays the date that the student is past due for the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Past Due Date will be when the student is incomplete for the vaccine according to Maine school law requirements.

Note:
The Earliest Date, Recommended Date, and Past Due Date are the same if a school or children's facility grade level tracking schedule is selected. Students are incomplete for that vaccine starting on this date. The Earliest Date is the recommended date for the student to receive the vaccine

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

Green: fills the background when the current date is on or after the recommended or past due date.
Grey: fills the background when a vaccine cannot be given because that immunization series is complete, contraindicated, maximum age exceeded, or the patient has immunity or medical exemption.

Maximum Age Exceeded: reflects whether a student has exceeded the maximum age to receive a specific vaccine. For example, if a student has already reached the age of five and has not completed the Hib series, then the recommendation for Hib at the bottom of the student immunization history will show Maximum Age Exceeded.

Maximum Doses Met or Exceeded for Vaccine Group: indicates that the maximum number of doses recommended have been administered for the specified vaccine series according to the tracking schedule.

Complete: indicates that an immunization series has been completed according to the tracking schedule.

Immunity Recorded for Vaccine Group: indicates history of disease or vaccine history. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.

Contraindicated: indicates history of disease, or the vaccine should not be given for medical reasons. If this message appears for varicella, this should be treated as history of chickenpox disease. A medical exemption is required if this message appears for any vaccine other than varicella.

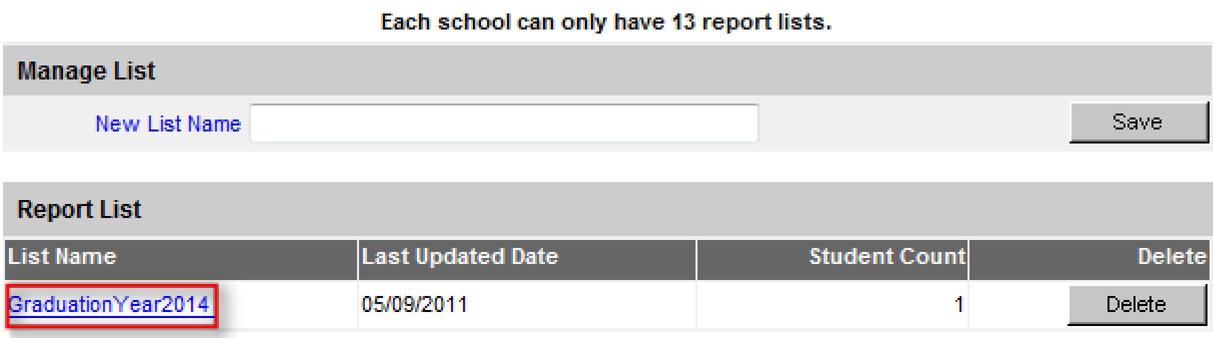
Note:
Religious exemptions are not recorded in ImmPact and are not displayed.

MANAGE LIST SCREEN

The Manage List screen is used to create new and manage existing student lists to be used for generating reports. A maximum of thirteen lists can be created by each school.

There are two main sections used in the Manage List screen:

- Manage List
- Report List



Manage List	Creates new lists for your school or children's facility organization in ImmPact.
Report Lists	Displays a table of all lists added to ImmPact by your school or children's facility in alphabetical order.
List Name	Displays the name given to the list by your school. If you click the name, you can view a detailed display of your students within the list.
Last Updated Date	Displays the date on which the list was last updated.
Student Count	Displays the number of students within the list. The count is determined by how many students are assigned to the list.
Delete	Displays a delete button for each list. If you click the delete button, the list will be deleted.

Note:
Once you delete a list, you cannot retrieve it. Deleting a list removes all students from the list.

Creating a New Student List

1. Click **Manage Lists** under the School Access menu group on the left side of the screen.
2. Enter a list name in the New List Name text field.
3. Click the **Save** button to add the list name.
4. The message will appear at the top, "The list has been created successfully". An example of a list name may be: Class of 2015. You will later add students to this list.

Note:
Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references such as kindergarten). Instead, use titles such as Class of 2020, Class of 2021, etc., using the year of high school graduation.

Removing a List

1. Click the **Delete** button to the right of the list.
2. When the Delete button is clicked, you will be given a prompt “Are you sure you want to delete this list?” Your option is either **OK** or Cancel.
3. Clicking **OK** will delete the list and remove it from the Manage List screen. Clicking on Cancel will cancel the delete and return you to the Manage List screen.

Opening the Reports/Client List Screen

1. Click a list name for the list you wish to view.
2. You will be taken to the Reports/Client List screen where you can view your student list. Further explanation can be found on the Reports/Client List Screen section, below.

Note:
You can only view details of a list that contains students. A list with zero count will not link to the Reports/Client List screen.

Reports/Client List Screen

The Reports/Client List screen is used to view students added to your school list and run reports for the students in the list. You can also view a student's immunization record and remove a student from your list.

There are three main sections used in the Reports/Client List screen:

- Reports Available: (List Name)
- Select Tracking Schedule
- Client List for: (List Name)

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.
Student Compliance Report	Displays the name, date of birth, immunization information and whether the student is compliant for Ages 4-6 years schedule and compliant for 7th Grade Entry.

Select Tracking Schedule

Tracking Schedule: Preschool/Day-Care

Client List for: JMeter Test Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	CHAVEZ	LUIS		01/01/2014
☐	PATIENT	MIKE	TEST	10/17/2007
☐	STUDENT	MARYC		02/11/2014

Reports Available for Schools

This section can generate three student reports within the selected list:

Student List	Displays the name and date of birth for each student on the list, sorted alphabetically by last name.
Student Immunization History	Displays the name, date of birth, and immunization history for each student on the list, sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth, and all immunizations due for each student on the list, sorted alphabetically by last name.
Student Compliance Report	Displays the student compliance based on the school tracking schedules pick list

Select Tracking Schedule

Choose the appropriate tracking schedule from the drop-down menu. This function allows users to set the tracking schedule for each report in order to evaluate all the records of all the students listed based on the school law requirements for their grade level to identify those students who are incomplete.

Generating the Student List Report

1. Click the **Student List** link.
2. The Student List report will open in a PDF document.

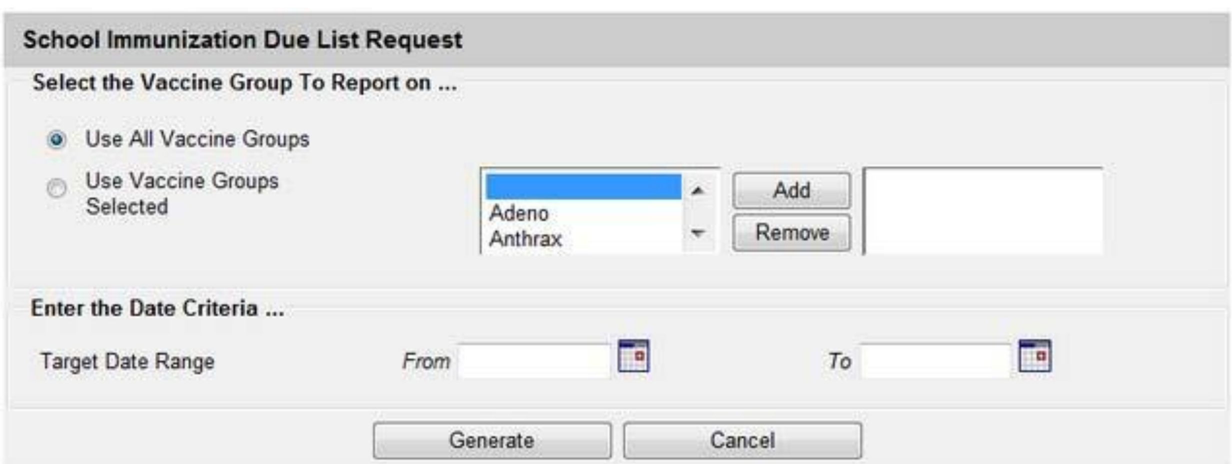
3. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Student Immunization History List Report

1. Click the **Student Immunization History List** link. You will be taken to the Check School Report screen where you can view the status of the report you are running.
2. Click **Refresh** periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
3. Once your report has finished generating, the report name will turn blue, and the report status will display “ready”. You can now click the link and view the report.
4. The report displays the immunization history and the recommended vaccines for each student on your list according to the Tracking Schedule selected on the Reports/Client List screen.
5. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Immunizations Due List Report

When requesting the Immunization Due report, you will be taken to a screen where you can enter criteria used for the report. The criteria for this report are explained below.



Selecting Vaccine Groups

The majority of the time, you will Click Use All Vaccine Groups. The immunization due dates will be based on the tracking schedule you have selected for this report. If a student is past due for any of the vaccines in the tracking schedule (for example, if he/she is past due for any vaccines required for kindergarten and you have selected the Kindergarten tracking schedule), then he or she will be included in the report outcome, given all other report criteria are met. If no students are listed in the report, then all students on the list are complete or up-to-date for the selected date range.

Choosing vaccine groups allows you to focus on a specific vaccine(s) within the selected tracking schedule. If the student is past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report, given all other report criteria are met. For example, you can use this report if you want to see which students on the list are due for a specific vaccine or if there is an outbreak of disease and you need to identify students on your list that may be lacking that vaccine. This report could be used to produce a list of susceptible students at your school or children's facility if all the students attending your school/facility have all their immunization dates in ImmPact.

1. Within the Select the Vaccine Group(s) section, select either **Use All Vaccine Groups** or **Use Vaccine Groups Selected**.
    a. If the Use Vaccine Groups Selected option is selected, choose the vaccine groups to be included.
2. Scroll though the vaccine group list and double-click the desired vaccine group name or click the vaccine group name and then click the Add button.
    a. All selected vaccine groups will appear in green in the box to the right.
3. To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box or click the selected vaccine group name and then click the Remove button.

When the report is generated, the only students that will appear on the list are those students who are due for the vaccine group(s) selected in the report criteria, but the report will show all vaccines included in the tracking schedule.

Selecting Target Date Range

When dates are specified, the report will only return those students that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.

Note:
The To date in the target date range may be set to the day your report is due to the local health department to identify students who will be due for a vaccine by this date.

4. Enter the Target Date Range in the From and To text boxes in the form MM/DD/YYYY or Click the calendar icon to set the date.

a. The From date, To date, or both dates can be left unspecified:
    i. If the To date is unspecified for the Target Date Range, the report date range will include the From date up to and including today's date.
    ii. If the From date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the To date.
    iii. If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To fields.

5. Click **Generate**.
    a. You will be taken to the Check School report screen where you can view the status of the report you are running.
6. Click **Refresh** periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
    a. Once your report has finished generating, the report name will turn blue, and the report status will say “ready”.
7. Click the link and view the report, which displays the Immunizations Due for each student on your list.
    a. If you selected a future date, then all children on the list will require vaccines by the date selected, but Due will only be displayed for those vaccines that are past due or due now. You will have to manually evaluate the rest of the record to identify those vaccines that are due before the future date selected.
8. Compare to see if all of the student’s immunizations are in the ImmPact if you have information from another source.
    a. Parents may have additional information if the child was born in another state or received services from a provider who did not report to ImmPact.
    b. Additional dates can be written on the printed CIS form but will not be reflected in the Immunizations Due report for students.
    c. The ImmPact forecast does not consider any vaccines that the parent has selected as a religious exemption.

Note:
There are two places in the ImmPact where you can select a tracking schedule. If you want to run a report for a group of students using a specific tracking schedule, such as Kindergarten, select the tracking schedule on the Reports/Client List screen. If you want to see the immunizations due for one student only, find the student and then select the tracking schedule on the Student Immunization Record screen.

Generating the Student Compliance Report

1. Select the appropriate Tracking Schedule from the Tracking Pick List

Reports Available for: JMeter Test

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.
Student Compliance Report	Displays the name, date of birth, immunization information and whether the student is compliant for Ages 4-6 years schedule and compliant for 7th Grade Entry.

Select Tracking

Tracking Schedule: ACIP / Kindergarten / Preschool/Day-Care / Seventh Grade

Client List for: JMeter Test Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	CHAVEZ	LUIS		01/01/2014
☐	PATIENT	MIKE	TEST	10/17/2007
☐	STUDENT	MARYC		02/11/2014

2. Click on the Student Compliance Report
3. Select the date range you wish to run against the student list and tracking schedule

Student Compliance Report Request

Enter the Date Criteria ...

Target Date Range *From* ______ *To* ______

Generate Cancel

3.1 The Date range will measure the student compliance for the students during the range selected.

Client List

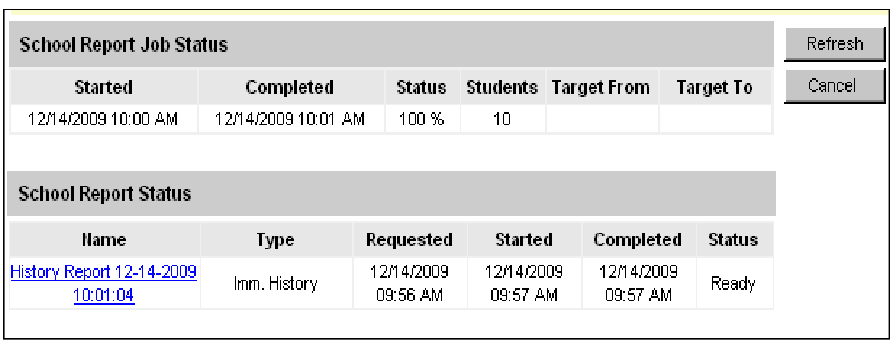
This section is for viewing student immunization records and removing a student from your list. Information contained within the student list table is described below.

Delete	If you wish to remove a student from your list, place a checkmark in the box beside the student's name in the Delete column. Remove more than one student at a time by checking multiple students. Next, Click the Delete button. Once you have confirmed the delete, a message will display "The list has been updated successfully" and your student(s) will be removed.
Last Name	Displays the student's lastname and provides a link back to the Student Immunization History screen.
First Name	Displays the student's first name.
Middle Name	Displays the student's middle name.
Birth Date	Displays the student's birth date.

Check School Report Screen

The Check School Report screen is used to display and/or determine the status of a report request. The screen is separated into two sections:

- School Report Job Status
- School Report Status



School Report Job Status

Started	Completed	Status	Students	Target From	Target To
12/14/2009 10:00 AM	12/14/2009 10:01 AM	100 %	10		

School Report Status

Name	Type	Requested	Started	Completed	Status
History Report 12-14-2009 10:01:04	Imm. History	12/14/2009 09:56 AM	12/14/2009 09:57 AM	12/14/2009 09:57 AM	Ready

School Report Job Status

This section displays the date and time a report was started and completed, the overall status in percentage, the number of students returned and the target date range if one was specified. Status will update by clicking the Refresh button. You can only have one job listed in this section. Once you run a new report, your previous job will be erased.

School Report Status

This section displays reports generated from the Reports/Client List screen. It contains the name of the report, the type of report, the date and time the report was requested, what time it started and the status. Your reports will be sorted by time generated, with the latest report at the top.

To get the latest update on all the requests listed in the table, click the **Refresh** button. This will show the most current status for each request from the ImmPact database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get back to the School Report Status screen, Click the Check School Report link on the left menu panel.

As soon as the report name appears as a hyperlink and the Status displays Ready, it has completed processing and is ready for viewing. To view the report, Click the report name hyperlink. This process can take some time depending on the size of the report. The selected report will automatically display using the Adobe Acrobat Reader. If there is a problem viewing your report, please contact the ImmPact Help Desk. At any time, click the **Cancel** button to return to the screen you were previously on.

CHAPTER 17: MANAGING BLOOD LEAD

In this chapter:

Blood Lead Module Access Information
Risk Assessment and Lead Test Recommendations
Viewing a Patient’s Blood Lead History
Viewing Blood Lead Tests
Entering Blood Lead Tests
Printing a Patient's Blood Lead Report
Blood Lead Reports

BLOOD LEAD MODULE ACCESS OVERVIEW

The Blood Lead module in ImmPact allows authorized organizations and its subsequent users to view, manage, and add blood lead test results. Organizations are set up in ImmPact to either have no access to a patient's blood lead results, view only access, or ability to add blood lead test results through ImmPact. Organizations that can add blood lead test results via an in-office testing device (LeadCare® II) must be approved by the Maine Childhood Lead Poisoning and Prevention Unit and have a Lead Reporting ID assigned to them in ImmPact by an authorized user. Organizations can contact the Maine Childhood Lead Poisoning and Prevention Unit at 866-292-3474 or ehu@maine.gov.

The blood lead module gives an authorized organization user the ability to:

- Add lab results for easy tracking of your in-office testing
- View patients lead results in the ImmPact system entered through Health and Environmental Testing Lab or by MeCDC approved provider offices including details of the provider who ordered the test, lab that submitted the test, test method, sample type, and result.
- Track follow-up actions needed to ensure the patient is appropriately tested per the Maine CDC guidelines
- Ability to add if a Risk Assessment was conducted, Lead Test Indicated, Date Lead Test was ordered, and status of the test based on age range (Due, Overdue, Complete, or Max Age Exceeded)
- Easy access to Maine CDC recommendations and guidelines for screening and follow-up management.
- Immediate recommendation of any follow-up needed based on last test result on the Blood Lead History table with easy color-coding display:
    - Red Highlight/Red Text = need a follow-up action
    - Green = no action needed
- Generate several reports to help track and analyze if your patients are getting blood lead tests as required and getting the appropriate follow-up management if needed.

Blood Lead Test Requirements and Recommendations

The table below displays Maine CDC Guidelines regarding routine blood lead testing. **Note:** As of June 2019, Maine law requires every child to have a blood lead test at age 1 year and again at age 2 years.

Columns for age of child, guidelines, date recommendation is due, if a risk assessment has been done, if a lead test is indicated, date the test was ordered, date of the test, and status of the recommendation are included on the table. This table will display regardless of age. The current recommendation row based on the child's age will be highlighted in green, unless an "Action" is needed (Repeat Test, Requires Venous Test to Confirm, or requires Follow-up/Management) – then the current recommendation would be shaded gray.

Parents may refuse to have their child tested on the grounds that the testing is contrary to the parent's or guardian's sincerely help religious or philosophical beliefs. If the blood lest test is refused, select Test Refused from the drop-down menu under Lead Test. The Status will then change to Completed.

The date a blood lead test is ordered can be entered in the Test Ordered column. This allows tracking of patients who do not show up at the lab for the blood test.

For 3-, 4- and 5-year-olds, a risk assessment should be performed to determine if the child needs a blood lead test. Clicking on 'Risk Assessment' will provide a copy of the risk assessment questionnaire. The risk assessment will indicate whether a blood lead test is recommended. In the Risk Assessment Done column select 'Yes' or 'No' to indicate if a risk assessment has been done. Select 'Yes' or 'No' from the drop-down menu in the Lead Test column to indicate whether a lead test is needed and select 'Test Refused' if the parent or guardian refuses the test. If a test is ordered, enter the test ordered date in the Test Ordered column.

Blood Lead Test Requirements and Recommendations Print Table

Age	Guidelines*	Date Due	Risk Assessment Done	Lead Test	Test Ordered	Date of Test	Status
1 year	Test Required	06/10/2019	NA	Test Required	06/14/2019	06/15/2019	Completed
2 years	Test Required	06/10/2020	NA	Test Required			Due
3 years	Risk Assessment	06/10/2021					Not Due
4 years	Risk Assessment	06/10/2022					Not Due
5 years	Risk Assessment	06/10/2023					Not Due

*Note: For schedule of routine screening and testing. For prior blood lead tests greater than or equal to 5 µg/dL see Action column below or review Maine CDC Guidelines

Blood Lead Test Requirements and Recommendations							
Age	**Guidelines***	**Date Due**	**Risk Assessment Done**	**Lead Test**	**Test Ordered**	**Date of Test**	**Status**
1 year	Test Required	01/17/2017	NA	Test Required			Maximum Age Exceeded
2 years	Test Required	01/17/2018	NA	Test Required			Maximum Age Exceeded
3 years	Risk Assessment	01/17/2019	Yes	No			Completed
4 years	Risk Assessment	01/17/2020	Yes	Yes	01/17/2020	01/18/2020	Completed
5 years	Risk Assessment	01/17/2021					Not Due
*Note: For schedule of routine screening and testing. For prior blood lead tests greater than or equal to 5 µg/dL see Action column below or review Maine CDC Guidelines							

Note: Prior elevated capillary blood lead test results require confirmatory venous testing and an alternate follow-up schedule (review the PDF Maine CDC Guidelines).

Viewing a Patient's Information

The Blood Lead History screen is comprised of five sections: Patient Information, Blood Lead Test Requirements and Recommendations, Blood Lead Test History, Blood Lead Data, and ImmPact Provider Notes.

To view blood lead information for a specific patient in ImmPact, use one of the following methods:

1. Click on the **Patient Search** link under the Patients section of the menu panel. This will display the Patient Search Criteria screen. For information on searching for patients, refer to chapter on Managing Patients. Once a patient is retrieved, select the [Blood Lead] button to display the patient's Blood Lead Test History screen.
2. Click on the **Manage Lead** link under the Blood Lead section of the menu panel. This will display the Patient Search Criteria screen. Once a patient is retrieved, you will navigate directly to the patient's Blood Lead Test History screen.
3. Click on the **Patient Search** link under the Immunizations section of the menu panel. This will display the Patient Search Criteria screen. Once a patient is retrieved, select the [Blood Lead] button to display the patient's Blood Lead Test History screen.

Patient Information

The Patient Information section at the top of the Blood Lead History screen displays the patient's name, DOB, Gender, Mother's Maiden Name, Medical Record Number, Patient's Address, Comments, and Patient Notes. This information should be used to verify that the correct patient was found during the search process. To edit this information, click [Edit Patient] and refer to the chapter on Managing Patients.

Patient Information				
Patient Name (First - MI - Last)	DOB	Gender	Mother's Maiden	Medical Record Number
PATIENT TEST	01/01/2001	M	BROWN	0001
Address	111 MAIN STREET, AUGUSTA, ME 12021			
Comments				
Patient Notes (0)	view or update notes			

Note: Patient Address, Maine County of Residence, Race and Ethnicity are very important fields to complete on the Demographic screen. Race and Ethnicity are located under the Patient Information section and Patient Address and County is located under the Address Information section. **You cannot enter a blood lead test without a complete patient address on file.**

Blood Lead Test History

Blood Lead Test History

Remove	Owned?	Date Sample Collected	Date Sample Analyzed	Date Results Reported	Blood Lead Level	Action
☐		07/04/2017	07/04/2017	07/25/2017	<3.3	BLL <5
☐		07/04/2016	07/04/2016	07/25/2017	4	BLL <5

The Blood Lead Test History section will list all of the selected patient's blood lead test results and information. Column definitions are listed below:

Remove: Please contact the Maine Childhood Lead Poisoning and Prevention Unit at 866-292-3474 or ehu@maine.gov to request a test be deleted. Only State users can edit or delete tests.

Owned?: If this column indicates "No," another provider organization entered or ordered the test and is attesting to its validity. Click on the "No" link to view the view blood lead test owner's contact information.

Date Sample Collected: This column lists the date the blood lead sample was collected. By clicking on the date link, the details for each individual blood lead test will display in a screen beneath the test history. Contact the Maine Childhood Lead Poisoning and Prevention Unit at 866-292-3474 or ehu@maine.gov to request a test be edited or deleted.

Date Sample Analyzed: The date the blood lead test was analyzed.

Date Results Reported: The date the blood lead test result was reported to ImmPact via the Health and Environmental Testing Lab (HETL) or entered into ImmPact via User Interface when saving the record.

Blood Lead Level: This column displays the reported quantitative result for a blood lead test, displayed in micrograms per deciliter.

Action **A prompt to instruct the provider what the next step should be. Actions are either Repeat Test, Requires Venous Test to Confirm, Requires Follow-up/Management, or BLL < 5.** Actions requiring follow up per Maine CDC Guidelines are shown highlighted in red. Tests that do not require follow up are shown highlighted in green.

Note: Owned vs. Not Owned Blood Lead Tests

A single provider does not own any of the patients within ImmPact, but an organization does own the blood lead tests it reports.

Blood Lead Test History Buttons

The Blood Lead Test History screen contains links to other ImmPact functions. These links are:

Immunization History: Clicking this button will return you to the Immunization History screen for the patient.

Edit Patient: Clicking this button will return you to the Demographic screen for the patient.

New: Clicking this button will display a new set of fields for entering a blood lead test result. This button only displays for authorized users.

Blood Lead Report: Clicking this button will display a PDF of the patient's Blood Lead Report.

Save: Clicking this button will save the blood lead test and automatically populate the Date Results Reported, Sample Accession Number, and PFI/LRI Number fields. This button only displays for authorized users.

Save Blood Lead Test Clicking this button will save the blood lead test and automatically populate the Date Results Reported, Sample Accession Number, and PFI/LRI Number fields. This button only displays for authorized users. Either 'Save' button can be used to retain Blood Lead results.

Viewing Blood Lead Tests

The most current blood lead test will display at the top of the Blood Lead Test History screen. The Action column will display the appropriate action based on the result of the last blood lead test. A red highlighted action indicates that a follow-up action is needed per Maine CDC guidelines. A green highlighted action indicates that no further follow-up action is required. Clicking on an Action hyperlink will display the Maine CDC Recommendations for Confirmation and Follow-up Schedule.

To view details of a previously entered blood lead test, click on the Date Sample Collected link in the Blood Lead Test History section:

Blood Lead Test History

Remove	Owned?	Date Sample Collected	Date Sample Analyzed	Date Results Reported	Blood Lead Level	Action
	No	09/14/2019	09/14/2019	09/14/2019	4 µg/dL	BLL <5
	No	09/12/2019	09/12/2019	09/12/2019	6 µg/dL	Requires Venous Sample Analyzed By the Maine Health and Environmental Testing Laboratory
	No	07/10/2018	07/10/2018	07/10/2018	4 µg/dL	BLL <5
	No	06/12/2017	06/12/2017	06/12/2017	4 µg/dL	BLL <5

The previously entered lead test information displays in a read-only format:

Blood Lead Test History

Remove	Owned?	Date Sample Collected	Date Sample Analyzed	Date Results Reported	Blood Lead Level	Action
	No	09/14/2019	09/14/2019	09/14/2019	4 µg/dL	BLL <5
	No	09/12/2019	09/12/2019	09/12/2019	6 µg/dL	Requires Venous Sample Analyzed By the Maine Health and Environmental Testing Laboratory
	No	07/10/2018	07/10/2018	07/10/2018	4 µg/dL	BLL <5
	No	06/12/2017	06/12/2017	06/12/2017	4 µg/dL	BLL <5

View Blood Lead Data Immunization History | Edit Patient | Blood Lead Report

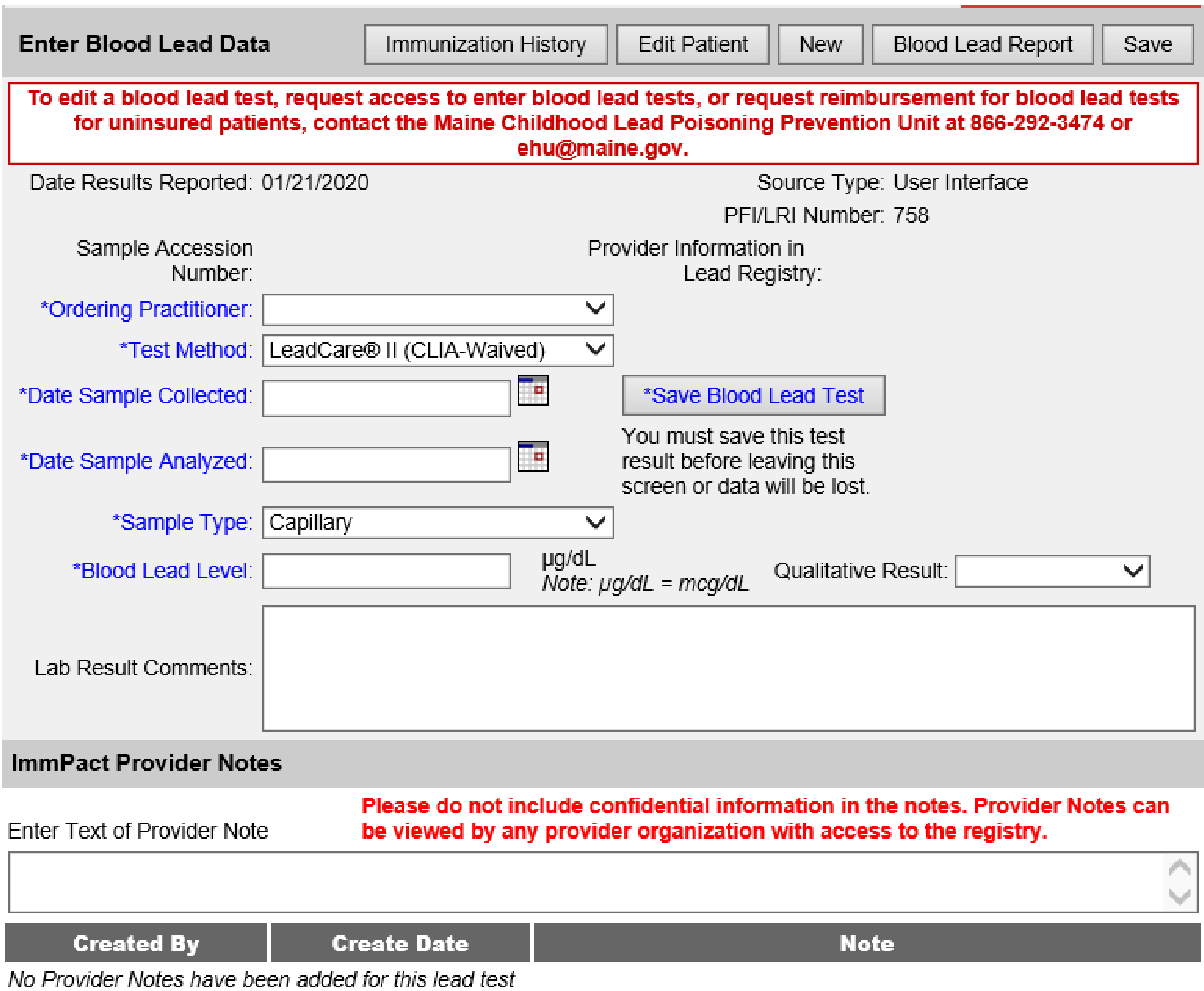
To edit a blood lead test, request access to enter blood lead tests, or request reimbursement for blood lead tests for uninsured patients, contact the Maine Childhood Lead Poisoning Prevention Unit at 866-292-3474 or ehu@maine.gov.

Date Results Reported: 09/14/2019
Source Type: Data Exchange
PFI/LRI Number:
Sample Accession Number: M91475428
Provider Information in Lead Registry: Ryden
301A US ROUTE One
SCARBOROUGH, ME 04330
(703) 213-6584

*Ordering Practitioner: EILEEN POULIN
*Test Method: GFAA
*Date Sample Collected: 09/14/2019
*Date Sample Analyzed: 09/14/2019
*Sample Type: Venous
*Blood Lead Level: 4 µg/dL
Note: µg/dL = mcg/dL
Lab Result Comments:
Comment Date:

Entering Blood Lead Tests - For Authorized Organizations only

The Enter Blood Lead Data Screen will be available to organizations authorized by the Maine CDC for submitting a blood lead test result. Users who have not enrolled with the Maine Childhood Lead Poisoning and Prevention Unit will not have access to the Enter Blood Lead Data screen. Contact Maine Childhood Lead Poisoning and Prevention staff at 866-292-3474 or ehu@maine.gov or visit http://www.maine.gov/dhhs/mecdc/environmental-health/eohp/lead/ld300/in-office-testing.shtml if you need to enroll. Organizations set up as view only organization will only see the Blood Lead Test History and View Blood Lead Screen.



Note: Do not enter a blood lead test result analyzed by another office or laboratory into ImmPact. Only state lead program staff may edit or delete preexisting lead tests in ImmPact.

For an authorized user to successfully add a new blood test result into ImmPact, the patient must have a completed address on file. The patient address information is critical for public health surveillance and follow-up. If the address is missing or incomplete the user will receive a message to click the “Edit Patient” button to update. The required fields to enter the test result will be locked until the address has been completed/updated (minimum address requirements are **Street Address, Zip, and City**). When all required address fields are completed the test entry fields will unlock and allow test result entry.

1. The first six fields listed below are automatically populated and do not allow user entry. Maine Childhood Lead Poisoning and Prevention staff at 866-292-3474 or ehu@maine.gov if you feel corrections are required.

    - *Date Results Reported:* Records the date the blood lead test result was submitted to ImmPact by clicking on the Save button when all required fields have been completed with valid information. Defaults to the current system date when reporting a new test result.
    - *Source Type:* Identifies whether the test results were entered through the user interface or received via data exchange from HETL.
    - *PFI/LRI Number:* Displays the assigned Lead Reporting Identification Number (LRI) for the laboratory or organization. This is the number assigned by the Maine CDC to Organizations authorized to enter blood lead data from an in-office blood lead testing device.
    - *Sample Accession Number:* Unique test identifier number automatically assigned when the user has completed all required fields and clicks on save. For tests entered into ImmPact, this is a value generated starting with ‘Z’ then using the organization’s PFI/LRI, the Date Sample Collected, and a sequence number beginning with 01 each day (ex: Z0010919201701). For tests received from data exchange with HETL, each test will receive a laboratory assigned accession number.
    - *Provider Information in Lead Registry:* Displays provider information received by laboratories submitting test results to Maine using HETL. This information is then transferred into ImmPact from HETL via data exchange. This field is blank for tests entered directly into ImmPact through the user interface.

2. The blue asterisked fields are required for each lead test. Information may not be left blank. If left blank, you will receive an error message and cannot continue until the information has been entered.

    - *Ordering Practitioner:* This field records and displays the name of the health care provider who ordered the lead test (Clinician). If this drop-down list is blank, your organization’s Vaccine Coordinator user must enter the first and last names of all Ordering Practitioners using the *manage clinicians* link (see chapter on Maintenance). **The Ordering Practitioner (Clinician) field must be set-up prior to entering patient blood lead test results.** The name of the Ordering Practitioner chosen should correspond to the name of the Health Care provider ordering the lab test.
    - *Test Method:* This field identifies the device used to perform the blood lead test. The drop-down list will default to LeadCare® II (CLIA Waived). The other options available in the dropdown are GFAA and ICP/MS. Choose the type of device used to analyze the specimen. Currently, the only approved instrument in Maine for in-office testing is LeadCare® II.

- *Date Sample Collected:* Enter the date the blood lead sample was collected in the MM/DD/YYYY format. A calendar is available to auto populate the field, if you choose to use it.
- *Date Sample Analyzed:* Enter the date the blood lead sample was analyzed in the MM/DD/YYYY format. A calendar is available to auto populate the field, if you choose to use it.
- *Sample Type:* This field identifies the type of sample used to perform the blood lead test. The drop-down list will default to Capillary. There is also an option for Venous. Choose the type of sample that was collected.
- *Blood Lead Level:* The result of the lead test in micrograms per deciliter. Depending upon the value of the test result, you will either record a numeric value or select a qualitative value. **Note:** If entering results from a LeadCare® II device, you may use the Qualitative Result field to enter your results as follows:

    - Record a quantitative, numeric value, in the Blood Lead Level field for tests within the reporting range of the testing device.

      Select “High” or “Low” from the drop-down box in the Qualitative Result field for tests outside the reporting range of the testing device (i.e. Select > 65 mcg/dl as “High”. Select “Low” as <3.3 for Leadcare® II. If a numeric value outside the device’s limit of detection is accidentally entered into the blood lead level field, you will receive an error message that instructs you to select an appropriate qualitative result for the device. If a value of “High” is chosen, upon saving you will receive a message that instructs you to verify the High qualitative result is accurate. **Note:** Selecting ‘High’ or ‘Low’ will replace any quantitative value entered.

3. The remaining two fields are for recording comments/notes for a specific blood lead test:

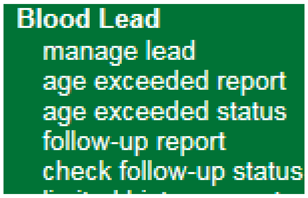
- *Lab Result Comments:* The user may enter a comment specific to the lab test that will be submitted to ImmPact. A comment cannot be entered, edited or deleted once the blood lead test has been submitted (Saved).
    - It is recommended to use this field to document when a patient is being referred to a clinical laboratory for a confirmatory venous specimen (analyzed using another test method) when the blood lead result obtained using a waived test method is 5 mcg/dL or greater, (such as a LeadCare® II device).
- *Enter Text of Provider Note:* The user may enter multiple notes regarding the entire test. Do not include any confidential information, as the information may be viewed by any provider organization with access to the registry. Previously entered notes may not be edited or deleted, unless the entire test record is deleted.

Note: If you are unable to enter a lead result, contact the Maine Childhood Lead Poisoning and Prevention staff at 866-292-3474 or ehu@maine.gov.

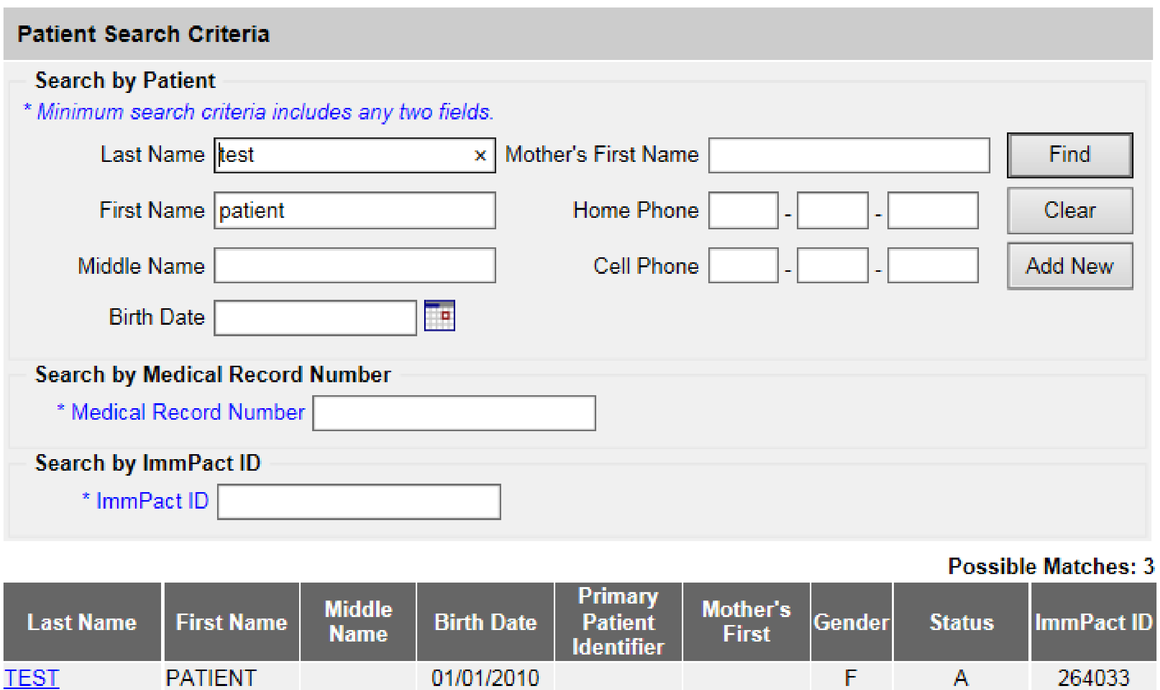
PRINTING A PATIENT'S BLOOD LEAD REPORT

A patient's blood lead report provides the details of the patient's complete blood lead test history. To print the report, follow these steps:

1. Click on the **Manage Lead** link under the Blood Lead section of the menu panel.



2. Search for and select your patient using the Patient Search.



3. Click the Blood Lead Report button on the screen.

4. The system displays the patient's blood lead report in PDF format.

IR Physicians

Complete Blood Lead Test History

Patient Name (L,F M):	**TEST, PATIENT**
Birth Date:	**07/01/2015**
Gender:	**MALE**

Draw Date:	07/04/2017	**Source:**	Venous
Ordering Clinician:	Test, Clinician	**Type:**	
Owning Organization:	IR Physicians	**Lab Accession #:**	1110704201701
Test Date:	07/04/2017	**Result:**	<3.3 µg/dL
Result Date:	07/25/2017		
Comment:			

Draw Date:	07/04/2016	**Source:**	
Ordering Clinician:	Test, Clinician	**Type:**	
Owning Organization:	IR Physicians	**Lab Accession #:**	1110704201601
Test Date:	07/04/2016	**Result:**	5 µg/dL
Result Date:	07/25/2017		
Comment:			

5. The patient's Blood Lead Report can be printed or saved to your computer.

BLOOD LEAD REPORTS

Test Due List Report

The test due report is populated with ImmPact data according to the selected criteria and time frame up to the date selected. Results are sorted in a chronological order by date of birth, with the oldest child first.

Test Due List Report

Select a Report

- (●) One Year Old Test
- ( ) Two Year Old Test

Select Time Frame

Time Frame: Today

The list reports will be populated with ImmPact data according to the selected criteria and time frame up to the date selected. Results are sorted in a chronological order by date of birth, with the oldest child first. In rare instances, a child's record may require manual review by the Maine CDC before it is matched into ImmPact and available for a report.

To generate a Test Due report, follow these steps:

1. Select Test Due List Report under the Blood Lead menu group.
2. Select the report criteria (looking for tests due at either age one year or two years)
    a. One Year Old Test
        i. Children who have reached 9 months of age but less than 18 months and no lead test yet
    b. Two Year Old Test
        i. Children who have reached 18 months of age but less than 36 months and no lead test between 18 months of age and less than 36 months of age.
3. Select a Time Frame
    a. Tests due today, or in the next 30, 60, 90 days
4. Generate the report
5. The Lead Test Due Reports Request Screen will appear

Lead Test Due Reports Request Status Refresh

Report Name	Started	Completed	Status	Patients
Two Year Old, in 90 days	11/22/2011 01:16 pm	11/22/2011 01:16 pm	100%	0
One Year Old, in 90 days	11/22/2011 01:15 pm	11/22/2011 01:15 pm	100%	0

6. Select under Report Name the report that you want, and the report will open in a spreadsheet format.
7. Print, save, or make changes to the report.

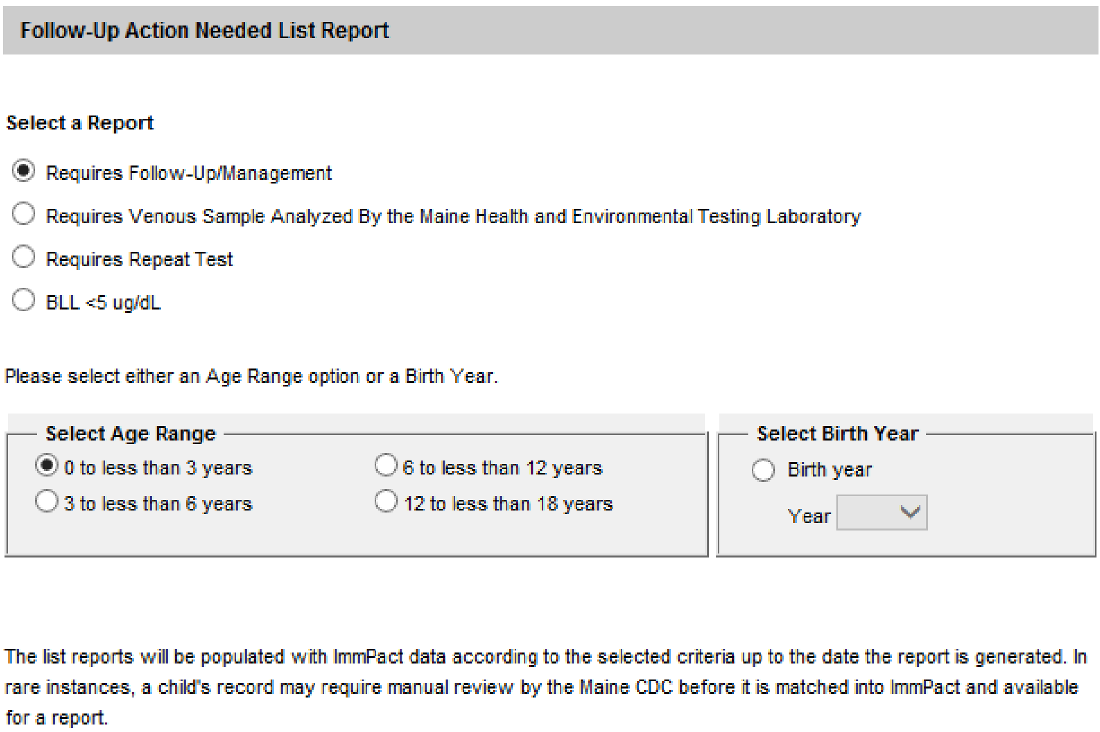
Test Due List Report
Two Year Old, today
08/14/2017
IR Physicians, 2
Maine CDC Pediatric Blood Lead Screening Guidelines

https://uswchuwica001/docs/PBLScreeningGuidelines.pdf
To create a hyperlink to the document, click on the URL above twice and then out of the field

Birth Date	Last Name	First Name	Responsible Person	Primary Phone	Street Address	City	ST	Zip	County
02/01/2015	TEST	JOHN					ME		
02/08/2016	MONTHS	EIGHTEEN			2121 EASY ST	AUGUSTA	ME	04330	Kennebec

Follow Up Action Needed List Report

The Follow Up Action Need List Report is populated with blood lead test result data according to the selected criteria and time frame needed. This will produce a list of active children in your organization whose most recent blood lead test requires appropriate follow-up.



To generate a Follow Up Report, follow these steps:

1. Select Follow Up Report under the Blood Lead menu group.
2. Select the report criteria
    a. Requires Follow-up Management
        i. List of active children whose LAST test was a venous sample, test method was not LeadCare® II and results were ≥ 5 µg/dL
    b. Requires Venous Sample Analyzed by the Maine Health and Environmental Testing Laboratory
        i. List of active children whose LAST test was a capillary sample, test method was LeadCare® or LeadCare® II and results were ≥ 5 µg/dL or greater OR last test was a venous sample, test method was not LeadCare® II and results were ≥ 5 µg/dL or greater
    c. Requires Repeat Test
        i. List of active children whose LAST test result was Not Tested.
    d. < 5 µg/dL
        i. List of active children whose LAST test result was < 5 µg/dL
3. Select an Age Range or Birth Year
4. Generate the report
5. The Lead Follow Up Reports Request Status Screen will appear

Lead Follow Up Reports Request Status [Refresh]

Report Name	Started	Completed	Status	Patients
BLL Under 5, 0 to 3 years	07/26/2017 07:33 AM	07/26/2017 07:33 AM	100%	1
BLL Under 5, 6 to 12 years	07/26/2017 07:31 AM	07/26/2017 07:31 AM	100%	1

6. Select under report name the report that you want, and the report will open in a spreadsheet format.
7. Print, save, or make changes to the report.

Follow Up Action Needed List Report
BLL Under 5, Birth year 2015
08/01/2017 **Birth Year 2015**
IR Physicians, 2
Maine CDC Pediatric Blood Lead Screening Guidelines

https://uswchuwica001/docs/PBLScreeningGuidelines.pdf
To create a hyperlink to the document, click on the URL above twice and then out of the field

Last Name	First Name	Birth Date	Responsible Person	Primary Phone	Street Address	City	ST	Zip	County	Collection Date	Sample	Test	Result
TEST	PATIENT	07/01/2015			111 MAIN STREET	AUGUSTA	ME	2021	Cumberland	07/04/2017	V		<3.3

Maximum Age Exceeded List Report

This Maximum Age Exceeded List Report is populated with ImmPact data according to the selected criteria and time frame up to the date selected. This will list all children that do not have a least one test and have exceeded the maximum age for that indicated age test. The user may select a previous date if desired. Results are sorted in a chronological order by date of birth, with the oldest child first.

Maximum Age Exceeded List Report

Select a Report

- (•) No One Year Old Test
- ( ) No Two Year Old Test by Three Years of Age
- ( ) No Test by Two Years of Age
- ( ) No Test by Three Years of Age

Select Date

Note: If Date is blank, today's date will be used.

The list reports will be populated with ImmPact data according to the selected criteria and time frame up to the date selected. The user may select a previous date if desired. Results are sorted in a chronological order by date of birth, with the oldest child first. In rare instances, a child's record may require manual review by the Maine CDC before it is matched into ImmPact and may be included on one of the reports as not being tested.

To generate an Age Exceeded Report, follow these steps:

1. Select Age Exceeded Report under the Blood Lead menu group.

2. Select the report criteria
   a. No One Year Old Test
      i. List of active children who are now 18 mos. and less than six years who did not have a test between the ages of 9 mos. and before 18 mos.
   b. No Two-Year-Old Test by Three Years of Age
      i. List of active children who are now 36 mos. and less than six years who did not have a test between the ages of 18 mos. and before 36 mos.
   c. No Test by Two Years of Age
      i. List of active children who are now 24 mos. and less than six years who did not have a test between birth and before 24 mos.
   d. No Test by Three Years of Age
      i. List of active children who are now 36 mos. and less than six years who did not have a test between birth and before 36 mos.
3. Select a Date, if Date is blank, today's date will be used

4. Generate the report

5. The Lead Max Age Exceeded Reports Request Screen will appear

Lead Maximum Age Exceeded Reports Request Status Refresh

Report Name	Started	Completed	Status	Patients
Only One or Two by Three, 7/27/2017	07/27/2017 01:28 PM	07/27/2017 01:28 PM	100%	0

6. Select under report name the report that you want, and the report will open in a spreadsheet format.
7. Print, save, or make changes to the report.

Maximum Age Exceeded List Report
No Tests by Three, 7/27/2017
07/27/2017
IR Physicians, 2
Maine CDC Pediatric Blood Lead Screening Guidelines

https://uswchuwica001/docs/PBLScreeningGuidelines.pdf
To create a hyperlink to the document, click on the URL above twice and then out of the field

Last Name	First Name	Birth Date	Responsible Person	Primary Phone	Street Address	City	ST	Zip	County
TESTY	TEST	01/01/2014					ME		
NEVILLE	LYDIA	03/11/2014			305 E TEST ST.	AUGUSTA	ME	04330	Kennebec
EXCEEDED	AGE	07/22/2014		(445) 445-4455	2345 MAIN STREET	AUGUSTA	ME	12345	Hancock

APPENDIX 1

In the Appendix:

Online Help
ImmPact Help Desk

ONLINE HELP 

The ImmPact online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in ImmPact by pressing the yellow light bulb on the menu bar in the top right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

When on any screen where you would like help, click on the light bulb on the menu bar located at the top-right of the screen.
A box with screen-specific help information will display. This help box may have any or all of the following features:

- **Purpose:** describes what the screen is meant to do or what kind of information needs to be entered.
- **Information provided:** describes in detail the input and output fields that are found on the screen.
- **Functionality:** provides information about specific buttons on the screen and describes their function.
- **Results:** describes the outcome of a search, report, download, or other information entered into the database.
- **User tips:** has advice or further information on how to use this screen.

To view these features, you may either click the links under the Purpose section or scroll down the page. To close the help box, press the X button in the top right corner of the box.

General Help

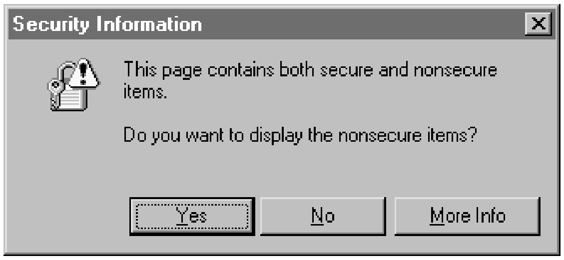
General help contains information on screens throughout ImmPact. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

Contents of General Help

To access the contents of general help follow these steps:

1. Click the light bulb on the menu bar.
2. Click **Help Contents** in the top left corner of the help box.

3. A box may open asking if you want to display both secure and non-secure items; click the **Yes** button.



4. The General Help screen now displays. On the left side of the page, view a list of topics, each with its own book-shaped icon.
5. Select a topic. A list of help items with question mark icons will display. You may also see further subtopics, each with its own book-shaped icon.
6. The help information you selected will display on the right side of the General Help screen.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
9. To collapse a topic, select it or click on the book icon next to it. You may toggle back and forth between opening and closing a topic by clicking on the book icon.
10. To close out of the help box, click the X in the top right corner of the box.

Viewing/Searching the General Help Index

To view or search the general help index follow these steps:

1. Follow Steps 1-3 under *Contents of General Help*.
2. Click the **Index** button on the top left side of the General Help screen.
3. To find an index topic, use the scroll bar to view index topics.
4. Click one of the help items to view the item.
5. The help information you selected will display on the right side of the General Help screen.
6. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
7. To close out of the help box, click the X in the top right corner of the box.

ImmPact Help Desk

If you are experiencing difficulties or have questions regarding ImmPact, you may contact the ImmPact Help Desk.

The ImmPact Help Desk hours are 8:00 a.m. to 5:00 p.m. Monday through Friday.

- Help Desk telephone number: 800-906-8754
- Help Desk e-mail address: ImmPact.support@Maine.gov

APPENDIX 2

In the Appendix:

Validation of Patient Entry Data

ImmPact validates the information you enter on the patient screen when you attempt to save the entries. If you have entered data that ImmPact considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Field Name	Web Page/Section	Characters Allowed
First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name
Mother's First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Mother's Maiden Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Street Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
PO Box	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT
FAMILY PLANNING	FAMILY PLANNING SERVICES
PLANN PARENTHOO	PLANNED PARENTHOOD

Disallowed First Name Entries

The following chart lists first name entries that will not be validated in ImmPact.

Disallowed First Names			
ADOPT	HBS	LSS	UNK
ADOPTIVE	HRH	LSS BABY	UNKN
AF BABY	I	LWG	UNKNOWN
BB	ILLEGIBLE SIGNATURE	MALE	UNKNOEN
BABY	INFANT	MR	UNKOWN
BABY B	INFANT BO	MRS	UNNAMED
BABY BOY	INFANT BOY	MS	UNREADABLE
BABY G	INFANT FE	NEWBORN	V
BABY GIRL	INFANT FEM	NFN	WLCFS
BABYB	INFANT G	NTXHW	XWM
BABYBOY	INFANT GI	PARENT	XXX
BABYGIRL	INFANT GIR	PARENTS	UFA

Disallowed First Names			
BG	INFANT GIRL	PENDING	
BOY	INFANT GRL	PVN	
BOY I	INFANT M	SIGNATURE	
BOY II	INFANT MA	SLKDFSLKD	
CHILD	INFANT MAL	SRM	
CSS	INFANTBOY	THWJ	
FEMALE	INFANTGIR	TOMORROW'S CHILDREN	
FIRE DEPT	INFANTGIRL	TSWJ	
GIRL	INFANTMAL	TSWM	
GIRL I	INFANTMALE	TSWV	
GIRL II	LCFS	TXWM	

Disallowed Last Name Entries

The following chart lists last name entries that will not be validated in ImmPact.

Disallowed Last Names			
ADOPT	CSS BABY	LSDKFSLDK	UNKNOEN
ADOPTIVE	CSSW	LSS	UNKOWN
A BABY	D S	LSSFC	UNNAMED
A F BABY	DCS	LTJR	UNREADABLE
AF	DFS	MBABY	V
AF BABY	DSS	M BABY BOY	VBABY
AF BABY BO	E BABY	MALE	VLK
AF BABY GI	F BABY	NEWBORN	WLCFS
AFBABY	FF	NLN	ZBABY
B C S	FIRE DEPT	OBABY	UFA
B S C	FWV	PBABY	
BABY	G BABY	PCS	
BABY BOY	GARCIA INF	PENDING	
BABYBOY	GIRL	RBABY	
BABY GIRL	GSST	SBA	
BABYGIRL	H BABY BOY	SBABY	
BCS	I	SCI	
BCSW	INFANT	SB	
BOY	INFANT BOY	SC	
BRT	INFANT FEM	SIGNATURE	
BSC	INFANT GIRL	SMRT	
CAC	INFANTBOY	SRB	
CS	INFANTGIRL	SRFC	
C S	INFANTMALE	SRP	
CAC	LSS	SS	
CBS	LCFD	TAO	
CCS	LCFS	UN	
CFCFS	LCSF	UNK	
CS	LNAME	UNKN	
CSS	LS	UNKNOWN	

Glossary

ACIP

Advisory Committee on Immunization Practices. Along with the Centers for Disease Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine. This "harmonized schedule" is the default schedule within ImmPact.

Bookmark

A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

Browser

A software program you use to access the Internet.

CoCASA

Comprehensive Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of patients for an immunization provider.

CDC

Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

Clinician

A person who provides a health care service and for the purposes here would administer an immunization; for example, a nurse.

Consent

Written permission obtained from a patient 19 years of age or older to permit future modification and edit of demographic and immunization information housed in the registry.

Custom Flat File Template

A customized layout, specifying fields and field lengths, for performing data exchange.

Data exchange

A feature that allows you to automatically exchange immunization batch files with ImmPact.

[redacted]

Deduplication

An automatic process that displays potential patient matches to help ensure that patient records are not duplicated in ImmPact.

Desktop

The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open the represented programs and files from the desktop screen.

Grace period

The default period of time prior to and following an immunization. This time period is used to validate a patient's immunization history; it does not affect immunization recommendations.

Historical Doses

Doses that the patient received, but it is unclear which organization in the registry, if any, actually administered the dose. (See also ImmPact Inventory Doses and Other Owned Doses.)

HL7

Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

Home page

The first screen in ImmPact that displays for users who have access to a single organization. This page contains announcements, release notes, resources, and the menu.

Hyperlink

A word or group of words that is underlined and appears in a colored font, usually blue, in ImmPact. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

Immunization Information System

Confidential, computerized information system containing patient demographics and immunization histories. Immunization Information Systems enable public and private health care providers to maintain consolidated immunization records.

Inventory Doses

Doses that are recorded in ImmPact through the user interface which subtract from an inventory lot whose quantity is recorded and maintained in ImmPact. (See also Historical Doses and Other Owned Doses.)

Logout

Button on ImmPact's menu bar that allows you to exit ImmPact. You may logout from any screen in ImmPact.

Lot number

The unique, identifying number given to each vaccine by the manufacturer.

Manage Access/Account Screen

The first screen in ImmPact, which displays for users who have access to multiple organizations. The user chooses one of the organizations to access.

Menu bar

The ImmPact menu bar is dark blue and appears at the top of every screen within the registry. The menu bar has several menu options: home, change password, logout, and help (light bulb). The menu bar on your Internet browser, on the other hand, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

Menu panel

The ImmPact menu panel is a medium blue color and appears to the left of every screen within the registry. The menu panel lists all of the ImmPact functions available to the user.

Ordering authority

A person with the capability of ordering an immunization for a patient; a person with ordering authority is generally the patient's pediatrician or primary care provider or, within public health organizations, the medical director.

Other Owned Doses

Doses that the organization knows it has administered, but not from any vaccine lots maintained in the ImmPact inventory module. (See also Historical Doses and Inventory Doses.)

Patient
Anyone who has an immunization recorded in ImmPact by a provider organization.

Patient Note
Some general, non-medical information regarding the patient that is displayed to any user viewing the patient's record.

PDF
Portable document file. A file format that allows you to view and print a document online in its original format with Adobe Reader.

Radio button
An input circle that, when clicked, fills with a black dot to indicate a selection.

Recall Notice
A card or letter that informs a responsible person or patient of immunizations that are overdue.

Reconstitution
The process of mixing a dry, powder form of a vaccine with a diluents to produce doses that may be administered to the patient. This term applies to Smallpox vaccine.

Release
A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, ImmPact release version 2.0.

Reminder Notice
A card or letter that informs a responsible person or patient of immunizations that are due in the future.

Responsible person
A parent, relative, or guardian who is associated with the patient and may act as a contact. A patient may also act as the responsible person for himself or herself.

Sequence
Identifies which dose is being referred to within a vaccine series. For example, a number "2" sequence indicates the second dose of the series.

Series

The compilation of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP/aP vaccine contains five doses.

Shortcut
An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

Toolbar
Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back Forward, Stop, Refresh, and Home.

Tracking schedule
A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a patient's immunization history and makes recommendations for future vaccinations based on that history.

Undeliverable Address
An indicator that the address currently on file for the patient is incorrect.

User roles
ImmPact users are categorized into hierarchical roles that determine their level of access to the functions of ImmPact.

Users
Individuals who access ImmPact in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.

Vaccine group
A category that describes one type of vaccination. For example, the vaccine trade names Engerix-B, Comvax, and Recombivax all fall under the Hepatitis B vaccine group.

Vaccine trade name
A unique, identifying name for a vaccine series given by the manufacturer. For example, Engerix-B is the trade name for a Hepatitis B vaccine manufactured by GlaxoSmithKline

Change History

The following Change History log contains a record of changes made to this document:

Revision Date	Version #	Author	Section/Description of Change
11/28/2017	0.1	Lacey Dean/John Schuetz	Maine customizations, Cold Chain, Des-Dec Fix Tool, Clinic Events
06/25/2018	1.1	Lacey Dean	IIS-243 Manage Inventory – Show ‘Active’ radio button. IIS-IIS-250 Password – Min character count
11/20/2018	1.2	Lacey Dean	FDD17014 – Ch.17 Blood Lead – County no longer required to enter blood lead results FDD17015 – Ch.10 Manage Patients – ‘Save’ functionality removed from History/Recommend, Patient Reports and Blood Lead buttons. FDD17017 – Ch. 10 Manage Patients – Mother’s Maiden Last field no longer displayed as *(on file)*. Field is now editable. Vital Statistics patient DOB field is now editable. FDD17018 – Ch.6 Manage Users & Orgs – Provider Agreement business rules updates.
03/14/2019	1.3	Lacey Dean	FDD17002 2.1.3- Ch. 17 Blood Lead – New Test Method options added to dropdown FDD19002 – Ch. 12 Cold Chain – New screen layout, business rules, Out of Range temp rules
07/29/2019	2.1.0	Lacey Dean	FDD19003 – Ch. 17 Blood Lead – New Timely Venous Report added to Performance Report
12/05/2019	2.2.0	Lacey Dean	FDD19007 – Ch. 17 Blood Lead – Update to Test Due List Report. FDD19010 – Ch. 9 Inventory – Update to Show Transactions IIS-429 – Ch. 9 Inventory – Remove ‘Other’
01/22/2020	2.3.0	Lacey Dean	IIS-441 – Ch. 9 Inventory – Add Inv. NDC Req. for Public lots IIS-289 – Ch. 11 – Add New Imm – ‘Delete’ Checkbox IIS-244 – Ch. 11 – Add New Imm – Admin Date blank default FDD19009 – Ch. 17 Blood Lead – Universal Testing Updates
04/17/2020	2.4.0	Lacey Dean	FDD20001 – Ch. 10 – Patient AKA.Edit Updates IIS-280 – Ch. 11 – Add New Imm – Activate Expired FDD20002 – Ch. 15 – Fix Tool – Remove button IIS-505 – Ch.17 - Lead – Simplify Age Exceeded Report
05/22/2020	2.5.0	Lacey Dean	FDD20004 – Ch. 17 Blood Lead – Test Method dropdown IIS-275 – Ch. 15 Fix Tool – Updated instructions for Update and Remove checkboxes
10/23/2020	2.6.0	Lacey Dean	FDD20007 – Ch. 9 Inventory -updated Show Txs Report FDD20009 – Ch.13 Clinic Events Administration FDD20010 – Ch.14 Doses Administered Report
12/09/2020	2.7.0	Lacey Dean	FDD20016 – Ch.9 Inventory – Pandemic Vaccine Request
01/22/2021	2.7.2	Lacey Dean	FDD20022 – Ch. 10 Add/Edit Patient Fields
05/20/2021	2.8.0	Lacey Dean	FDD20003 – Ch.11 Managing Immunizations – Duplicate Immunization Popup FDD20012 –Ch. 12 Cold Chain – Ultra Cold Freezer Unit FDD21011 – Ch.10 Manage Patient- Patient Status FDD21013 – Ch.9 Manage Inventory – Expired Doses, Submit Reconcile Inventory